**Proposal Readiness Tool**

This Proposal Readiness Tool will assist you to introduce your project to a prospective funder.

Many funders provide a template for proposals or letters of inquiry (LOI) that requires you to respond to set question prompts. Other funders ask for a simple 2–3-page narrative, offering little guidance on content format. This Readiness Tool will assist you to respond to all scenarios.

This Readiness Tool will:

1. Introduce the content most often requested in a proposal or LOI.
2. Provide an outline for responding to an open-format proposal or LOI.
3. Serve as a repository for program details and data, such that they can be easily “sourced” for proposals and LOIs that follow a funder-determined format.
4. Identify gaps in content that may impact readiness to advance to the proposal seeking stage (Can you answer all the question prompts?).

Additionally, this Readiness Tool will:

1. Equip TU Development and OSPR staff with a conversation guide when “pitching” the project concept to program officers at prospective foundations.

**The Typical Proposal and LOI**

Most proposals and LOIs include these components, though the headings may differ:

* Executive Summary
* Overview of Organization
* Statement of Need
* Project Description
* Project Goals, Anticipated Outcomes & Assessment
* Timeline
* Key Personnel
* Request for Funding/Budget

The task boxes on the following pages provide guidance on how to prep to address the component topics. Too many gaps in information suggests that your project is not ready to advance to the grant seeking stage.

Please do not invest time in a writing polished narrative. Sentence fragments and snippets of data are sufficient. **This is your source document, not your final product.** Continue to get started!

**Executive Summary**

**Prepare what comes first, last!**

In a typical Letter of Inquiry format, the first prompt often asks for an Executive Summary. The suggested length for the Executive Summary is most often 100 words (roughly one paragraph of 8-10 concise sentences) but sometimes it is just 100 characters. Read the instructions carefully!

To craft an effective Executive Summary, **first complete all other sections of the LOI**, developing your narrative from the bulleted information collected in this Readiness Tool. Once all other sections are complete, go back through your responses to pull out the main point from each section. String these details together to make a rough paragraph, then wordsmith for clarity and coherence. The resulting paragraph should:

* Briefly introduce TU and your project.
* Succinctly summarize the problem to be addressed and what solution your project offers.
* Indicate the start and end dates of the proposed program.
* Highlight the ways in which your project aligns with the funder’s goals.
* Summarize your project goals and assessment plan.
* Identify partners, their roles and support given.
* Articulate the request amount and how funds will be allocated.
* Describe potential for sustainability (longevity).

**After completing all other sections**, return to this spot and add your draft here:

 Click or tap here to enter text.

### The Overview

In this section, you will prepare to briefly introduce TU and your project.

**Tip:** When preparing for a specific LOI or Request for Proposal (RFP), jot notes on the funder’s specific philanthropic priorities. To the extent possible, echo that language in your overview to signal alignment with the funder’s philanthropic priorities. You want the reviewer to keep reading!

Gather details and make notes on the following:

* What does your proposed project do?
	+ Connect to TU Mission & Funder’s Mission

NOTES: Click or tap here to enter text.

* Who/how many does your project serve?
	+ Number served; demographic and geographic scope

NOTES: Click or tap here to enter text.

* How long has your project been underway (pilot? nascent? Mature by ready to expand?)
	+ Highlight accolades relevant to the funder’s interest

NOTES: Click or tap here to enter text.

* What makes this project different/better than others doing similar work?
	+ What is the unique value-add?

NOTES: Click or tap here to enter text.

* Who is leading your project?
	+ Board, staff and/or volunteers

NOTES: Click or tap here to enter text.

* How does the constituency/audience that your project serves have a voice in shaping programming?

NOTES: Click or tap here to enter text.

**Statement of Need**

In this section, you will prepare to articulate how your project addresses a problem of concern to the funder. If you do not have a specific funder identified, consider what type of funding you are likely to pursue and keep this in mind as you create your notes. For example, if you offer a food pantry, you likely will seek grants from funders interested in ending hunger. What information would be of value to that funder?

**Tip:** Your Statement of Need response should be funder centric. Funders do not exist to help TU meet its goals. Funders resource those organizations which help them to meet *their* goals/philanthropic mission! Position your TU and your project as a solution provider!

Gather details and make notes on the following:

* What problem does your project addresses?

NOTES: Click or tap here to enter text.

* What constituency/audience is impacted?

NOTES: Click or tap here to enter text.

* What will be the consequence if the problem is not addressed?

NOTES: Click or tap here to enter text.

* Reiterate how your project aligns with the funder’s goals/philanthropic priorities.

NOTES: Click or tap here to enter text.

**Project Description**

In this section, you will prepare to introduce the project for which you seek funding.

**Tip:** More than likely, your proposal will be screened initially by someone who is not the decision maker (i.e., program officer, volunteer grant reviewer, etc.). The screener may skim to assess “fit” before doing a close read of your submission. Where appropriate, echo key words or phrases from the funder’s statement of philanthropic priorities or RFP to catch the reviewer’s attention.

**Tip:** Understand that the screener may be responsible for “pitching” the best proposals to the decision makers. When you are ready to draft your proposal, build your narrative from your bulleted notes so that the screener can deconstruct your narrative to create bullets for presentation to the decision makers. The most effective proposal submissions are clear, concise and include convincing metrics.

**Tip:** Addressing sustainability/longevity can be challenging. When it is not possible to replicate the project without additional funding, consider which aspects of the project are inherently sustainable. Does your project foster a train-the-trainer model? Does your project create materials that can be shared? How can you disseminate lessons learned through your network of peers or partners?

Gather details and make notes on the following:

* What stage of maturation is the program?
	+ Pilot, nascent, mature, or expanding
* NOTES: Click or tap here to enter text.
* When does it start and end?

NOTES: Click or tap here to enter text.

* What is the scope of activity of the project?
	+ What you will do, who will do it, and who will you do it for?

NOTES: Click or tap here to enter text.

* Who will participate?

NOTES: Click or tap here to enter text.

* What voice do the beneficiaries have in shaping the project’s goals or activities?
	+ Community-led project or response to community-voiced issue

NOTES: Click or tap here to enter text.

* What are the project’s goals and how will they be evaluated?
	+ Goals should be measurable.

NOTES: Click or tap here to enter text.

* How does the project align with the funder’s goals/philanthropic priorities?

NOTES: Click or tap here to enter text.

* How might the project continue after the funding period?

NOTES: Click or tap here to enter text.

# Project Goals, Anticipated Outcomes and Means of Assessment

In this section, you will prepare to outline goals, expected results, and how you will measure success. The most compelling proposals include metrics. Impact can be articulated by breadth or depth. To be competitive, your project should serve more (breadth), or do more for those it serves (depth).

**Tip:** Be realistic about what can be measured during a one-year funding period. For example, if you are working with youth aged 14-15 on a summer bridge program to increase academic success, you can compare test scores at the beginning of the program to scores collected at the end of the program to document academic gains. You cannot credibly promise increased graduation rates as that milestone is years beyond the end of the project.

Gather details and make notes on the following:

* What are the project’s goals with metrics/outputs?
	+ Strong proposals articulate reasonable metrics and a plan to track them
		- For example, instead of “We will increase use of the food pantry,” bolster with detail to read, “We will increase utilization of the food pantry in June by 10% in comparison to last June, as measured by a headcount attendant.”

NOTES: Click or tap here to enter text.

* What are the project’s expected outcomes?
	+ Be specific so funders can assess impact
		- For example, instead of “This project will reduce hunger,” add detail to read, “This project will reduce hunger in our community by providing meals to 200 families.”

NOTES: Click or tap here to enter text.

* How will you collect data to document success?
	+ Data collections tools vary according to project type and goals
		- A few examples of data collection tools include attendance sheets, headcount attendants, participant pre- and post-surveys, and pre- and post-skill assessment scores.

NOTES: Click or tap here to enter text.

* What does success look like?
	+ Competitive proposals are grounded in reality
		- Plan for progress not perfection! Consider what factors outside of your control might impact your project outcomes and plan for this when setting your goals. For example, if you are serving a population that has limited access to transportation, perhaps adjust expectations for attendance. Success may look like “participants attended 7 out of 10 sessions.”

NOTES: Click or tap here to enter text.

**Timeline**

In this section, you will begin to think through yourproject timeline. A well-thought-out timeline will demonstrate your preparedness to execute the project for which you seek funding. Refer to How to Construct a Timeline for guidance and timeline building activity.

**Tip:** As you prepare your timeline, consider what “touchpoints” exist for donor engagement and/or stewardship. For example, will there be an activity that the donor might enjoy observing? What “products” of the project are sharable after the project concludes (i.e., photos? participant reflections)? Be sure to secure participant permissions or share in ways that protect participants’ privacy.

Gather details and make notes on the following:

* What are the activities in **preparation** for the project? Note deadlines and personnel accountable for each task.

NOTES: Click or tap here to enter text.

* What are the key milestones related to the **execution** of the project? Note deadlines and personnel accountable for each task.

NOTES: Click or tap here to enter text.

* What tasks are associated with the **evaluation** of the project? Note deadlines and personnel accountable for each task.

NOTES: Click or tap here to enter text.

**Key Personnel**

In this section, you will prepare to communicate the qualifications of those involved with the project to increase funder confidence that it will be well-executed.

**Tip:** Curate the professional summaries of your key personnel. The funder does not need to know their entire professional histories. Highlight qualifications and achievements **most relevant to the proposed project**.

Gather details and make notes on the following:

* Who will lead the program and what are their qualifications?

NOTES: Click or tap here to enter text.

* Identify program partners (if any) and describe what role they will play.
	+ will they provide expertise, transportation, funding, etc.

NOTES: Click or tap here to enter text.

# Request for Funding/Budget

In this section you will prepare to articulate your funding request amount, explain how grant funds will be used and detail what funding (cash and/or in-kind) is already in place to support the project. Refer to How to Build a Budget document for guidance and budget building activity.

**Tip:** When crafting the budget, consult the project timeline. Consider if each task listed has an associated cost. The budget should reflect all anticipated expenses.

**Tip:** When crafting the budget, consult the project narrative. Have you recorded a budget item for any activity/item in the scope of project that is not covered by TU? For example, if TU does not have space to host a planned summer activity, your budget should include an item for space rental.

Gather details and make notes on the following:

* What is your requested amount? Detail anticipated expenses and estimated costs.

NOTES: Click or tap here to enter text.

* How will funds be used? Use of funds should align with your timeline and scope of activity.

NOTES: Click or tap here to enter text.

* If your request is for partial funding, what cash or in-kind commitments can you document?
	+ Recommendation: if this support is coming from an external partner, request a letter of support that can be shared with funders

NOTES: Click or tap here to enter text.