



Proposal Writing

Toolkit



Copyright © 2020 GATE. Attribution-NonCommercial 4.0 International (CC BY-NC 4.0).

You are free to:

- Share - copy and redistribute the material in any medium or format.
- Adapt - remix, transform, and build upon the material.

For full terms and conditions, see [license](#).

Suggested citation

GATE: Cavallo, S. (2020). Proposal Writing Toolkit.

Acknowledgements

The creation of this document was financed by ViiV: Positive Action.

Author: Shena Cavallo

Editor: Erika Castellanos

Designer: Gabriel Germaine de Larch

Contents

| | |
|--|-----------|
| Overview of the Toolkit | 4 |
| Before You Get Started | 5 |
| Introduction | 7 |
| PART ONE: Introducing Your Work | 8 |
| 1.1. Funding Request / Cover Letter | 8 |
| 1.2. Cover Sheet / Executive Summary | 8 |
| Exercises: | 8 |
| Proposal Narrative | 9 |
| PART TWO: Proposal Narrative | 10 |
| 2.1. Needs Assessment / Statement of Need | 10 |
| 2.2. Goals and Objectives | 11 |
| 2.3. Methodology and Strategies: | 12 |
| 2.4. Evaluation | 14 |
| Proposal Narrative | 15 |
| 3. PART THREE: Creating a Budget | 15 |
| 3.1. Budgeting | 16 |
| Making The Final Case | 18 |
| 4. PART FOUR: Making the Final Case Why You Should Receive Funding | 18 |
| 4.1 Qualifications/Organizational Background | 19 |
| 4.2 Supporting Documents/Appendices | 20 |
| Checklist and Follow-Up | 21 |
| Conclusion | 23 |
| Glossary | 24 |

Overview of the Toolkit

This toolkit is a guide to help you write proposals to fund your organization or work. Your grant proposal is the main tool that the funder uses to get to know your work better and understand how you plan to make progress towards the change you hope to make in the world. Funders sometimes receive hundreds, even thousands of applications, so the information you provide in your proposal must be as clear, specific and powerful as possible.

Grant proposals can take a lot of time. This tool can help you to gather all the important information about your organization and work in one place, which you can update and change as needed.

Proposal templates and guidelines (the documents that funders will ask you to complete as part of the request for funding) are all different, but the sections you will see below (“Needs Assessment”, “Goals and Objectives”, etc.) are common across many funders’ grant proposal and application forms. Once you have completed these sections, it should be easier to fill out the proposal forms for other funders by copying and pasting the information that you have stored in this document.

The tool is divided into four main sections:

1. Introducing the Work to the Funder
2. Proposal Narrative (the Part Describing the Problem You Hope to Address and Your Work)
3. Creating a Budget
4. Making the Final Case for Why The Funder Should Give You A Grant

It may be easiest to start with the “Proposal Narrative” section, followed by “Creating a Budget” section, and then finish with the first and fourth section. These sections – “Introducing the Work” and “Making the Final Case” basically summarize, or tell in a more simple, shorter way, your plans and ideas that you will put in the second and third section. It will be easier to explain what you want to do in fewer words in these two sections after you have already laid out all of the work and ideas in more detail in the second and third section.

Please note that we have provided you with a glossary at the end of the tool with some commonly used terms.

Before You Get Started

Funders have certain issues or themes that they focus on and will only fund specific projects. This is very important. If the funder does not think your organization or work is a good match, they may not even read your entire proposal.

You will need to look closely at the funding criteria (these are the rules that the funder will use to determine if they will consider your proposal), as well as funding guidelines (advice funders provide for applying for the grant). Funding criteria might include:

- the countries or regions where the funder or donor is funding
- the kinds of issues or work that they will fund
- the profile of the organization, such as size and leadership –
 - For example, some donors only fund organizations led by people under the age of 35, some funders only fund organizations that have a budget of \$200,000 or less, and some funders may only support organizations that are already registered.

You will want to make sure you read the donor's website and any other materials you can find online. Another source is your current donors; donors tend to know each other so your current donors may be able to provide you with tips or may be able to make an introduction or recommend your organization to the new donor.

Read the requirements and guidelines for the funding for which you are applying carefully. You should also look at other projects or groups that the donor or funder supported in the past. By looking at other grantees or projects that they have funded, you will be able to guess if you have a good chance. Keep in mind, donors' priorities or interests change so past projects might not tell you very much if the donor has recently changed or expanded its focus to new issues or areas. Some donors will invite questions and communication. If this is the case, take advantage of the offer.

Sometimes you can make the case that even if your work is different from what the donor usually supports, there is still an important connection. For example, maybe a donor only funds work with community health workers as part of a strategy on HIV/AIDS, while you do work on housing, making sure that people are not discriminated due to their health status. This is connected. You might just have to make a strong argument to show the connection. Another example might be a funder who supports work on homeless or unhoused people, and you work with LGBTQ youth, some of whom are homeless or living on the streets. Although homelessness is not your main priority, if you are also do some work to advocate for more shelters or support for trans youth who have left their homes, you might be able to apply for funding. If you can draw a simple diagram showing the connection or easily explain the connection between your work and the donors' interests in only a few sentence, it may be worth applying for funding.

Pay attention to words that the donor frequently mentions – feminist, human rights, social justice, rights-based, environmental justice, accountability, participatory – if these words apply to your work or how you approach the problem – use them! Using some of the same language as the donor can help the donor understand that there is alignment (meaning your work and their work have a strong connection so funding your work, will help them advance their work). Some donors also prefer certain “strategies”, such as advocacy to change policies or laws, for example. In this case, it might be useful to show that you also are thinking of some of the same strategies as the donor. For example, you may be working to give intersex people the tools and information they need to do their own advocacy, rather than only advocating on their behalf. This is a strategy that may interest some donors.

Finally, read and review the directions carefully that the funder provides. Some donors will reject proposals simply because you did not follow the directions. It may seem like a small thing, but since donors receive hundreds or thousands of applications, you do not want to give them a reason to reject your proposal.

Here are some questions to ask yourself and some advice to keep in mind:

| | |
|--|--|
| <p>What does your work and the donor’s work have in common? What is similar?</p> | <p>Look at word limits. If the donors asks for only 500 words or 1,000 character (the number of letter and spaces), follow this guidance closely.</p> |
| <p>Pay attention to any other funding restrictions that the donor has. These are usually very strict. If the donor, only funds in Latin America and you are based in Nigeria, the donor will probably not even look at your application. Some donors also cannot fund projects that include advocacy (trying to change laws, for example). If you do not fit these requirements, it is better to look for other funding opportunities.</p> | <p>Be very careful about deadlines. Donors will not accept a late proposal. If the donor requires you to submit the form through an online system, plan to do it with a lot of time in case you have trouble with the online portal or system.</p> |

Introduction

1. PART ONE: Introduction

1.1. Cover Letter / Overview of Funding Request

1.2. Cover Sheet / Executive Summary



PART ONE: Introducing Your Work

1.1. Funding Request / Cover Letter

Here is your opportunity to provide a short (one page), simple overview of your organization, what your organization is trying to do or achieve, and reason for the funding you are requesting (include the amount). Imagine if you were to meet a donor in an elevator or on the street. You only have a few minutes to tell them about your work and why they should fund you. This document is the written form of that situation.

- Be sure to include a sentence or two that makes clear that by funding your organization, the donor or funder will make progress towards achieving their own objectives. In short, show how your organization's work will further the donor's own work.
- Explain the positive impact that your work will have. What will you achieve? This should be very brief and simply serve as a quick introduction.

Although this is usually the first part of a proposal, it is better to write this part last, once you have completed the entire grant proposal so that you are clear about your ideas and know what you want to highlight.

1.2. Cover Sheet / Executive Summary

An executive summary is the most important part of your proposal because it might be the first and sometimes, the only section the donor will read before deciding if your work matches their own funding priorities and if they should continue reading the proposal.

Your executive summary should explain three main points:

| | |
|------------|---|
| IMPORTANT | That your work or project is necessary and important for your community (why does this work matter?) |
| EXPERIENCE | That your organization has the experience, knowledge and skills needed to accomplish your plans (are you the best organization to do this work? why should the funder choose you instead of another organization) |
| ALIGN | That the work you are proposing is connected to the work that the funder is interested in (what do you and the funder have in common about the change you want to see in the world) |

You may also want to include the following in your executive summary:

- Your organization's mission and purpose/goal (for more on mission and vision please see Section 4)
- The impact of your work – what do you think your work will achieve?

Exercises:

Spend some time thinking about the following questions:

- What makes your organization unique or different? What would be the one thing you would like someone to know about your organization?
- What makes your work special? Why did you begin this work?
- How is your organization different than other organizations that do similar work?
- If you have already done any programs, what are you most proud of? Even if you haven't organized any activity yet, tell the story about how you came together as an organization

Proposal Narrative

- 2. PART TWO: Proposal Narrative
 - 2.1. Needs Assessment / Statement of Need
 - 2.2. Goals and Objectives
 - 2.3 Methodology/Strategies
 - 2.4. Evaluation



PART TWO: Proposal Narrative

2.1. Needs Assessment / Statement of Need

This part is where you want to explain what the problem is that you hope to change or plan to work on. This is your chance to show the donor that you are familiar with and understand the problem or the issue. This is also your chance to make a clear case for why this work needs funding.

This section should make it clear that the problem or issue is urgent and important. Some things to think about:

- How often does the problem or issue occur?
- Why is the problem important? Why did you pick this problem or issue?
- How many people are affected? If the problem impacts many people, explain which people your project will focus on (e.g. people living in a certain community or neighborhood)
- What are some other side effects or consequences of the problem or challenge?

Please remember that donors might not understand as much as you about what the problem is or why something is a serious or important problem. Explain the problem or the challenge in a way that you would to someone who is learning about the issue for the first time.

It is also important that you make it clear that you understand the real cause of the problem. Many problems have more than one cause, and you want to make clear that you have thought through the different causes and identified the ones that you and your organization are best placed to solve. For example, if trans people have poor health indicators and consistently receive poor health care, this is likely due to discrimination and bias on the part of health providers. But it may also be because health providers have not received proper training.

If others are already doing work to respond to the problem, mention it and explain why your work is also needed, or why your work is unique. What makes your way of addressing or responding to the issue special?

It is important to show a few things in this section:

- Show that the problem is urgent, but show that it CAN be solved, not that it is too big or too difficult to solve. Donors like a success story.
- Provide some history about the problem and some statistics or numbers. A story could be powerful since some problems don't have statistics or research available.
- Keep it brief; this section should not be more than one page.

2.2. Goals and Objectives

This is the section where you can show what you want to achieve both in the shorter term and in the longer term (beyond the timeframe of the project or the funding).

A goal is often a change that will take a very long time to achieve, like a change in a law or a change in certain norms or beliefs, such as ideas about what women and girls can or cannot do, or the discrimination faced by trans people. You will not be able to achieve such a big change in a yearlong project, but you can make progress towards it.

The objective is something you believe can be achieved during this grant period. Objectives are more specific or detailed than a goal, and usually refer to a specific time and location. In order to reach your goal, you must first achieve your objective.

Objectives should be SMART:

- **Specific** (describe who, what, where). Who is doing the action and where? What is the action?
- **Measurable** (how will you know that a change has occurred? How can you measure or learn from the work you are doing and know if it is successful?)
- **Actionable or Achievable** within the time frame of your project (can you achieve this with the resources that you have and in the timeframe of the project?)
–Let’s pause and look at these three. You might set a goal of wanting to be “healthier”, but that is not very specific. A better goal would be “I will eat a homemade dinner with at least 2 vegetables three times a week for two months”. This is also something measurable (3 times per week) and actionable (eat dinner with vegetables in your home)
- **Relevant** (related to the goal – if your goal is to combat stigma against young trans people, your objective should be related – to educate teachers about trans rights, gender identity and expression, and gender norms and stereotypes)
- **Time-bound** (to be done within a specific period of time)

Here are some examples for you:

Goal #1: To improve the mental health of the LGBTQ community (This is a big goal, it cannot be achieved during the project)

Objective #1: To establish a safe center for LGBTQ persons where people can access psychologists, therapists, counselors and wellness experts and meet other LGBTQ people in Rio de Janeiro, Brazil. (This is a smaller, more manageable goal, one that can be achieved during a project period of one or two years).

Objective #2: To ensure that LGBTQ people know of health and support resources available in Rio de Janeiro, Brazil.

2.3. Methodology and Strategies:

This is the section where you will explain the how – how do you plan to do the work? What specific strategies or activities will you use during the grant period? Activities could be trainings or workshops, communications campaigns, meetings with local decision makers, etc. Be specific and describe these activities in detail. How many meetings will you hold? Who will attend? If you are sharing information about an issue, with whom will you share it? Why do you think these strategies will be effective in advancing your objectives? Think about what kind of change you want the activities to cause or bring about. Who will benefit and how will they benefit? Be sure to say who will be responsible for the activities (what staff or team members are responsible) and when the activities will occur.

Note: If the funding is unrestricted, donors might not necessarily want as many details about the activities. You may just need to provide a few examples of the activities that you plan to carry out during the course of the grant period or your strategic plan, but you will not be obligated to carry out specific activities.

If you have many activities, it might help to create a timeline or chart with the months when the activities will take place.

| Work Plan Template | | | | |
|--------------------|--|--|--|---|
| | Phase 1 | Phase 2 | Phase 3 | Phase 4 |
| | List of activities | List of activities | List of activities | List of activities |
| Activity | Identify local decision makers who support our cause | First Meeting with local decision makers who support our cause | Follow-up Meetings to get decision-makers' commitment to propose a new law | Follow-up with local decision makers who support our cause, reminding them of their commitments |
| Activity | Advertise feminist reading circles for trans women and non-binary people | Select participants for feminist reading circles, prioritizing rural, low-income or trans and non-binary people of color | Organize reading circles, select materials, etc. | Evaluate the reading circles, create a what's app group so that participants can stay in touch |

This kind of format will organize the work and show how the work will continue to build and develop in stages or steps. You could also include a column with indicators or expected outputs (see evaluation section below).

Another option is to divide this section by each objective and then describe the activities that are connected to the objectives below:

Goal #1: To improve the mental health of the LGBTQ community

Objective #1: To establish a safe center for LGBTQ persons where people can access psychologists, therapists, counselors and wellness experts and meet other LGBTQ people in Rio de Janeiro, Brazil.

- Find a safe, affordable location to rent or partner with another community organization to use one of their rooms.
- Do outreach to therapists, counselors and other mental health professionals to see if they would volunteer some time to come to the community space and offer their services.
- Spread the word about the space among a trusted circle of LGBTQ people.

Objective #2: To ensure that LGBTQ people know of health and support resources available in Rio de Janeiro, Brazil.

- Create a fact sheet or brochure on different resources available for LGBTQ community to circulate on social media and in-person community events.

There are some other things donors like to see in this section:

- How do you plan for any unexpected problems or challenges? Is there a risk that local elections could impact your project? An annual holiday, for example? Could your work face risks or attacks from the community?
- Be realistic! Think about how many staff you have, how many hours they have to work per week, and how big is your budget. Make sure you plan something that you can manage with your funding and staff or members.
- Who will you partner with? Even if you are doing most of the work alone, donors like to see that you have thought about other organizations, actors or individuals who you can work with, share knowledge and experience, or tell about your project. Think about if there are government officials, other NGOs, health providers, teachers, etc. with whom you can partner.
- How will you share what you are doing? With whom will you share it?
- Even if you have no other funding for the work, donors like to see that you have thought about some ways to ensure the project continues even without their support. This is not easy to do, and you don't have to have a perfect answer but a sentence or two about seeking other sources of funding or partnering with other organizations could be helpful here.

2.4. Evaluation

This section is important because it shows that you have thought about how you will know if the activities you are doing are successful or if they help you to reach your objective and move you closer to the goal that we discussed in section 2.2.

This is a very important section for funders because they want to fund projects that will have an impact and will lead to change. They also want to know that you will know when your strategies are not working, and you will be able to change course or try new things.

What are some of the clues or pieces of information that will help you know that you are making a change, even a small one? What do you need to know to be able to judge if your work is successful or not what, what info would you look for?

Some donors will ask for different things, using different words – expected results, outcomes, indicators. What all these terms have in common is that they are different ways for you to know if you are successful and to measure the progress that you are making.

Expected results or outcomes, for example, are clear measures of events, changes in behavior or knowledge or attitudes that you can use to understand if you are getting closer to reaching your objective. Indicators are how to measure the progress you make towards reaching or meeting your objective.

Think about it like this: Activities lead to outputs (outputs could be, for example, the number of callers you receive on a sexual health hotline for LGBTQI people), these outputs can lead to changes or effects which, then, in turn, lead to impacts or results. For example, the outcome would be that callers now have more accurate, non-judgmental information about their sexual health.

Some samples of how you can measure or evaluate your project:

-Each event we organize will reach at least ____people with the number of people participating in our events growing by____% over the course of the first year.

| Objective | Activity | Indicator |
|---|--|---|
| Increase the understanding and knowledge of women in engaging in democratic processes | Training workshops and surveys before and after the training to measure the participants' knowledge of participating in democratic processes | -number of workshops held -number of participants -change in knowledge based on simple survey before and after workshop -actions taken by women after the workshop |

Proposal Narrative

3. PART THREE: Creating a Budget 3.1. Budgeting



3.1. Budgeting

Here is where you will show the cost of your project or activities.

To begin, go back and look at the activities you plan to do. If you talk about giving out information or organizing a workshop, make sure that you include all the costs in this section, including compensation for the people who are doing the work. In the case of organizing a workshop, think if you need to rent a space, if you need to bring refreshments. Some other common costs will include travel costs for staff, and equipment and supplies. You should be sure to include staff salaries for those who are working on the project. These are considered “direct costs”.

You will likely see the term “indirect” or “overhead” costs here. Indirect costs are costs that are connected to the organization’s overall operations. Indirect costs include rent, internet and utilities, for example. Some funders have limits on what percentage of indirect costs they will cover.

Each funder may have their own template. If you can design your own, an option would be to include broad budget categories, and below put more detailed categories or “sub-categories”. This more detailed section can show how you reached the number you have (3 trips to the capital at the cost of \$150 per trip = \$450).

Please look carefully to see if you will need to submit the budget in the currency of the funder (US dollars, for example) or if you can submit it in your own local currency.

Sample Budget Categories

Salaries and Benefits: List each position by title and name of employee, if available. Show percentage of time to be devoted to the project. (e.g., project coordinator at 60% for 12 months)

Staff Travel: This includes transportation costs, hotel, per diem or meals and incidentals, etc. Please include the reason for travel. (e.g., To meet with members of Parliament, to have a strategy meeting with other activists)

Meetings/Trainings: Show the number of trainees or participants. Include cost of meeting space rentals and other costs associated with carrying out meetings, trainings, workshops, sensitizations, etc.

Publications: Specify costs for editing, design, printing (estimated number of copies and cost per copy), mailing, etc.

Supplies: List items by type (office supplies, postage, training materials, etc.) Generally, supplies include any materials that are expendable or consumed during the course of the project.

Equipment: If specific equipment (a voice recorder, a camera, a computer) is needed to carry out the proposed work, please list it here.

Overhead/Indirect Costs: This includes salaries of staff who are not working on the project, rent, utilities, bank fees. These are costs associated with running the overall organization; they are not specific to the project (direct costs). Many organizations calculate their overhead to be approximately 20%, though some donors may only fund 7 or 10%.

A sample budget template (though most donors will have their own):

| Organization: | | |
|---|---------------------|---------------------|
| Grant Period: | | |
| Category | Description/Details | Grant Budget (US\$) |
| Salaries and benefits of Staff Involved in Project: | | |
| Salaries and benefits of Staff Involved in Project: | | |
| Total Salaries and Benefits: | | |
| Staff Travel Costs: | | |
| Staff Travel Costs: | | |
| Total Travel Costs: | | |
| Equipment | | |
| Total Equipment costs: | | |
| Total Direct Costs | | |
| Overhead/Indirect Costs | | |
| Total Budget Request | | |

It is possible you may be applying for general operating support. In this case, you do not need to make a specific budget. You should simply include your organizational budget, with all of your costs. This is funding that is not tied to a specific activity, but donors will often want to see an organizational budget (as well as audited financial reports or statements) to understand how you monitor and track your spending.

Making the Final Case

- 4. PART FOUR: Making the Final Case Why You Should Receive Funding
 - 4.1 Qualifications/Organizational Background
 - 4.2 Supporting Documents



4.1 Qualifications/Organizational Background

Write a brief history of your organization and the work you do, including your mission and vision. If your organization does not have a mission and vision, it would be a good exercise to think about them, as many funders will ask for them. Funders want to make sure that your activities and work are “mission-driven” meaning that there is a clear connection between what your organization is trying to achieve (your goal) and the work that you have asked the donor to fund.

The vision statement focuses on the future and what you want the world to look like.

Some examples of vision statements:

Outright Action International: Outright envisions a world where LGBTIQ people everywhere enjoy full human rights and fundamental freedoms, exercise self-determination, form strong communities, and thrive personally and economically.

Amnesty International: A world in which every person enjoys all of the human rights enshrined in the Universal Declaration of Human Rights and other international human rights instruments.

The mission statement focuses on what the organization does and/or why it exists. Both the mission and the vision should have a clear connection.

Outright Action International: Outright works at the international, regional and national levels to research, document, defend, and advance human rights for LGBTIQ people around the world. We partner directly with human rights defenders, allies and organizations to produce reliable data on the experiences of LGBTIQ people around the world and support research-based advocacy and capacity-building for the human rights of LGBTIQ people.

Amnesty International: To undertake research and action focused on preventing and ending grave abuses of these rights

In this section, you can also link to your website or list your social media pages.

If the funder or donor focuses on a specific type of work (HIV/AIDS, poverty, climate change), focus on the work you do that is related and show why your organization is the right organization to work on this issue. If your organization also does other work, it is ok to mention it, but you want to make sure you make a strong argument for how your organization’s work fits with the donors’ priorities or focus.

Even if you are a new organization, maybe your members and staff have certain knowledge or experience that make them especially qualified or skilled to work on this issue or problem. Maybe you bring a unique perspective, or you established your organization because there was no existing similar organization operating in your town, village or city. Make the case for your organization!

Things you may want to also include:

- A brief history of the organization’s founding/how the organization came about
- A detailed list of your nonprofit’s past major projects and initiatives.
- Short biographies of the organization’s leaders and key staff or members, especially people who will be working on the project.

4.2 Supporting Documents/Appendices

Here is where you may want to include some additional information. If your organization has a work plan, a diagram explaining how the staff works together, or any other document that you think will help the funder understand the organization or the work, you can include it here.

There may be certain documents that the funder requires. This list and the names of the documents also might be different depending on the rules in your country for a non-profit organization or civil society organization.

1. Registration documents (is your organization a registered organization for tax purposes, for example?)
2. Governance Documents (how is your organization run or what are the rules of your organization? This may include bylaws, articles of incorporation, etc.)
3. Listing of all of the staff and members of the board of directors
4. Financial statements and operating budget (other sources of funding or donations)
5. Biographies of key members of the organization or who will be doing the work
6. Work plans, activity plans.

If you do not have one of these documents, and it is requested, you can explain why you do not. For example, if you only have one donor currently you could include your financial report for that donor in place of audited financial statements. You may not have a strategic plan, but you may have a work plan. Include what you have or provide a timeline for when you will have the requested materials (e.g. if you are in the process of opening a bank account).

Checklist and Follow-Up

Checklist and Follow-up
Final Advice
Glossary



Checklist (please stop and review!)

- ✔ Is there a clear connection between the problem or the situation you describe and what you are trying to achieve? Remember the link is probably clear to you but ask yourself if someone who doesn't know your work could understand the connection between the problem you present and the work you want to do.
- ✔ Do your objectives and activities connect? Could someone who doesn't know your work well understand the connection? Ask yourself how your activities help you get closer to the objectives.
- ✔ Did you make sure that there is consistency across the proposal? For example, if you describe three meetings in the activities/methodology section, do you have the same number in the budget? Are all the numbers and dates the same?
- ✔ Did you include all the necessary costs for the activities you have planned in your budget? Did you make sure you included overhead or indirect costs as well?

Follow-up:

- If you do not hear any news from the donor, follow-up with the donor. If you have not received the grant, it's fine to ask why they decided not to fund your organization. Not all donors will take the time to tell you, but if they do, it could be useful information that you can use to improve your future applications. In some cases, it can take two or three tries before you receive funding.
- At this stage, you could also ask the funder if they know of other funding sources that you might be able to apply for.

If you do get funding:

- Some donors will request reports or check-in calls periodically. A general tip is to share some information about your project with the donor over the course of the year, especially if you don't have regular check-ins. It's good to keep them informed and excited even if you only send a photo or a short email about something you are proud of or something you have learned. This can help to ensure that the donor remains interested in your work. You could also send them a social media post about your work.
- Donors should communicate if and when you can apply for another round of funding. If they do not, ask!

Conclusion

Do not let a proposal scare you. They often seem like a lot of work but if you start early and divide them into sections, it will be easier. If you can work on it with other activists or colleagues, do that, since it not only will be less work, but also an opportunity for you and your colleagues to talk about and think about what you would like to achieve, what is interesting or new about the work you want to do, or why it matters.

We are all so busy trying to make changes in our communities that we don't have much time to sit down, to breathe, and to think. This could be the opportunity to reflect on what you have achieved, what you still want to achieve and what motivates you.

Maybe you are a new organization, and you think you haven't achieved much. Even the act of coming together as an organization, however, is an important first step. You may want to show the challenges that your community faces or the other pressures that you and your fellow organization members face. Now is a good time to write down the story of how you came together to create change. This is a big accomplishment, too!

Finally, do not give up. Sometimes your proposal is rejected simply because donors receive many applications and may only have a few spaces to fund new groups. Continue trying and, whenever possible, talk directly to donors if you have the chance to meet them face-to-face or virtually.

And while it is a lot of work to apply for funding, hopefully this tool provides you with a space to store information about your organization and work that you can use again and again for other donors. Good luck!

Shena Cavallo

shena@gscconsultancy.com

Glossary

501(c)(3) (US based grants) – an organization in the United States that does not have to pay taxes. It may be a charity or a public non-profit, for example. Some US-based donors will want to understand if your organization qualifies as such an organization or its equivalent in your country.

Bilateral Funders - A bilateral donor refers to a government organization that gives direct assistance or funding to a country or organization. Bilateral donors are typically federal ministries, offices, departments, and agencies that give grants, loans, in-kind services, expertise, etc. to other governments, civil society, and multilateral organizations. An example would be the Danish Development Agency or DANIDA.

Conflict of Interest – any situation in which an individual has a third-party interest (often financial, but not always), either from your own engagement or the involvement of a family member. For example, if you regularly use services from a family member this could be seen as a conflict of interest because the family member receives a (financial) benefit from the exchange.

Direct Costs - costs directly related to the project or work, the costs required to carry out or do the activities. These differ from “indirect costs”, which are related to the broader cost of operating an organization (see below). Direct costs are the costs that can be easily identified as being part of the activities that you have planned.

General Operating Support or Unrestricted Funding - funds that are not restricted in any way and can be used to cover a range of operational and programmatic costs (including salaries, travel and rent).

Goals - long-term aims or objectives of an organization or your work, what you would like to achieve in the long-term. Basically, why you are doing the work that you are doing.

Indicators - how you measure progress towards your goal or how you measure what you achieve (results) against what you planned you would achieve. This could be in terms of timing, number of people or participants, or quality of the activity.

Indirect Costs - Indirect costs are costs that are connected to the organization’s overall operations or running the organization. Indirect costs include rent, internet and utilities, for example. Some funders have limits on what percentage of indirect costs they will cover.

In-Kind Contribution - any kind of contribution or good or service that is not money. Some examples might include voluntary work, donating goods (computer) or services (legal advice that a lawyer provides you for free).

Intermediaries – Organizations set up to collect funds from other funders and re-grant them to civil society organizations.

Lobbying - advocacy or trying to influence a group, person or entity towards a certain objective, often policy change, but can include any decision-making in politics or government.

Matching Grant - a grant made in the same amount as another grant. For example, a government funder may require that you have a similar amount of funds to cover a part of your project.

Monitoring and Evaluation (M & E) - an approach to collect and learn from information to improve performance of activities or strategies. M & E, sometimes known as LME (Learning, Monitoring and Evaluation) or MEL (Monitoring, Evaluation and Learning) helps you to see if you are reaching your objectives.

Multi-lateral Funders - Funders or donors whose members include various country governments (typically three or more) for the purpose of joint funding or other types of cooperation. Examples include the United Nations or the African Development Bank.

Objectives - Like goals, objectives are something you are trying to achieve but objectives are more specific or detailed than a goal, and usually refer to a specific time and location. Reaching or achieving the objectives will bring you closer to your goals.

Outcomes/(Expected) Results - clear measures of events, changes in behavior or knowledge or attitudes, that you can use to help you understand if you are getting closer to your objectives.

Private Foundations - foundations typically established by a family or individual and with an endowment or initial investment.

Public Foundations - foundations set up to raise funds from the general public and sometimes known as charities. They usually receive their funds from a variety of sources.

Project-Based Funding or Restricted Funding - funding that is tied to a specific activity or project. This funding can only be used on what the grantee and donor have already agreed upon.

SMART Objectives - Objectives that are specific, measurable, actionable, relevant and time-bound.

Strategic Plan - A plan or roadmap that helps you determine the direction of your organization. This can also give you the opportunity to record your mission, vision and values, as well as longer-term goals.

Theory of Change - how an organization connects its activities to its goals and outcomes, how you understand your work helping you to reach your goals.