**34. Proposal Template**

**FUNDING PROPOSAL**

[PROJECT TITLE]

Prepared by:

Organisation:

Place:

Date:

**Executive Summary**

The purpose of the Executive Summary is to provide a short, concise introduction to the project. The best time to complete the Executive Summary is after you have completed the proposal. By all means write a rough draft of your Executive Summary, but refine and finalise it after you have completed the document. At that point you have a much clearer idea of what is important and what needs to be highlighted. Your Executive Summary should address the following:

| **IMPORTANT INFORMATION TO INCLUDE** |
| --- |
| What problem or need will be addressed? |
| What is our solution or reaction? |
| Why is this solution necessary and different? |
| Why should xx address this problem? |
| Describe what the project aims to achieve in an overview. Provide measurable objectives. *Consult the* ***PURPOSE*** *block in the LFA.* |
| What is the time frame? |
| Where will it operate (geographical area)? |
| What will have changed as a result of the project? |
| Who will benefit and how? |
| Include the credentials of the project leader. |
| What is the total project budget? |
| What is the amount requested from the donor? Place this amount in **BOLD.** |
| Where will the balance come from? |
| How will this project help the donor realise their vision and mission? |
| *Length: one page* |
| *Is the Executive Summary brief, clear and interesting to catch the reader’s attention?* |

Table of Contents

Generate a detailed table of contents including subheadings and page numbers.

**INTRODUCTION**

[Enter your text]

| **IMPORTANT INFORMATION TO INCLUDE** |
| --- |
| Provide a brief summary of the problem the project aims to resolve. |
| Provide an overview of the proposed method or solution. |
| Establish credibility by describing anticipated outcomes and/ or accomplishments. |
| Explain why this project is the best approach. |
| List the project's past achievements. |
| Convince the donor that this project can make a real difference. |
| Tell a success story of your project. |
| *Is this introduction brief and interesting?* |
| *Length: one page* |

**CASE STATEMENT**

[Enter your text]

This section provides a detailed analysis of the problem or need the project will address. Never confuse the problem with the solution. The section should include the following information:

|  |
| --- |
| **IMPORTANT INFORMATION TO INCLUDE** |
| What is the context and cause of the problem? |
| Is this problem general or local? |
| Identify specific aspects the project will address. |
| How does the project match with the donor's ideals/ values? |
| What solution does the project offer? |
| Is this approach new or original? |
| Can the project be replicated? |
| Who is involved in similar work? What can we learn and will we work with them? |
| Define precisely the problem to be solved, so that there is no doubt in the donor's mind that a real problem exists. |
| Use data, statistics, and quotes from authorities to support your case. |
| Explain which elements of the problem this project will address. |
| Provide possible support or endorsements of credible agencies. |
| What are the general benefits for the target audience? |

**ORGANISATIONAL INFORMATION**

The purpose of this section is to provide the donor with a brief introduction to XXX and the department that will implement this project.

Please provide information on the department/centre that will be responsible for the project implementation. This section should include the following information:

| **IMPORTANT INFORMATION TO INCLUDE** |
| --- |
| Which department will implement this project and why is the department the best for the project implementation? |
| What does the donor need to know about XXX? |
| What do you want the donor to know about XXX? |
| Is this information relevant to the project? |

**PROJECT OBJECTIVES**

In this section state clearly what the expected project outcomes will be. This is achieved by describing the specific goals you have set, as well as the specific objectives through which you will achieve these goals. The goal is a broad statement of what you want to accomplish. The objectives are specific things you will do to accomplish the goal and should be measurable. The following information should be provided in bullet format:

| **IMPORTANT INFORMATION TO INCLUDE** |
| --- |
| Do the activities match the objectives? |
| Are your objectives measurable? |
| What is the project goal? |
| *Consult the* ***GOAL****,* ***PURPOSE,*** *and* ***OUTPUT*** *blocks in your LFA.* |

**TARGET AUDIENCE AND BENEFICIARIES**

Indicate the target audience and beneficiaries of this project by answering the following:

| **IMPORTANT INFORMATION TO INCLUDE** |
| --- |
| Who will the project target? |
| Who will benefit from this project? |
| How will you select the target audience? |
| How many individuals will benefit from this project? Be specific. |
| *Note that the beneficiaries and target audience might differ, for example, the project might train teachers to assist learners. The teachers will be the target audience and the learners will be the beneficiaries.* |
| *Complete and/ or consult the Excel project chart* |

**PROPOSED SOLUTION**

Explain in detail what methods you will use. Clearly direct or tie your methods to the objectives and explain how the methods will help you to achieve your objectives. In cases where different methods were used to address a similar problem, it might be necessary to explain why this specific method will be more successful.

| **IMPORTANT INFORMATION TO INCLUDE** |
| --- |
| How will the project undertake the activities (method)? |
| Why will your activities and methods produce the best results? |
| Why have we chosen these activities and methods? |
| Do these activities match the objectives? |

**ACTIVITIES AND TIMELINE**

The activity plan provides a breakdown of exactly what the project team will do during the different phases of the project. This includes every single activity from the planning phase to the evaluation phase at the end of the project. The activity plan is the exact activities and tasks to be performed to achieve each of the different objectives. Add the timeframe to the activity plan to indicate what you will be doing, the duration, and the deadline of each activity. This section should include the following information:

| **IMPORTANT INFORMATION TO INCLUDE** |
| --- |
| Is a timeline included? |
| List the project activities. |
| *Complete and consult the Excel project chart.* |
| *Consult the* ***ACTIVITIES*** *and* ***OUTPUT*** *blocks in the LFA.* |

**PROJECT TEAM**

Indicate the human resource requirements. State how many of the personnel on the project will have to be paid out of the project budget and why. The section should include the following:

| **IMPORTANT INFORMATION TO INCLUDE** |
| --- |
| Who will do financial management? |
| Who will ensure implementation and project management? |
| Who will ensure the project outcomes? |
| Who will report back to the donor? |
| Identify which project members will be responsible for each project activity. *Consult the Excel project chart for this information.* |
| Why are these project members the best in what they do? |
| Provide a project team/organisational structure. |
| Attach a *curriculum vitae* of all project team members in the résumé template. |
| Is the project team BEE compliant? |
| What is the team succession plan? |
| Is there capacity building in the team? |
| Will these appointments apply to XXX’s recruitment practices? |
| *Consult the* ***RESOURCE*** *block in the LFA.* |

**PARTNERS**

This section should include the following information:

| **IMPORTANT INFORMATION TO INCLUDE** |
| --- |
| How will the relationship with your other partners be managed? |
| Who are the other partners? |
| What is this organisation/individual's experience in this field? |
| Attach marketing material of these partners. |
| What are the partners’ mission and vision? |
| Relate a success story of your partner. |
| *Complete and/ or consult the Excel project chart* |

**SOLUTIONS TO IDENTIFIED RISKS**

Indicate to the donor that you have thought about all the possible risks that might occur and provide solutions to these risks.

| **IMPORTANT INFORMATION TO INCLUDE** |
| --- |
| What are the risks? |
| Who will deal with these risks? |
| How will you deal with the risks? |
| *Check the* ***AUSSUMPTION*** *columns in the LFA.* |

**BUDGET**

Complete the Excel budget template. Do not include the budget in this template. **The fund development unit should compile a strategy for your project where different donors may be approached for different items on your budget.** The Excel budget template will allow the unit to customise budgets to contain the items that each donor requires. It is important that your budget is realistic and not inflated.

Include a budget narrative to address the following information:

|  |
| --- |
| **IMPORTANT INFORMATION TO INCLUDE** |
| Provide cost centre/ledger number, if applicable. |
| How will the money be managed? |
| Indicate whether you require the entire budget at once or whether it can be paid in phases. Many donors prefer to pay in phases because it gives them control over the project and money. |
| *Complete the Excel budget template.* |
| *Consult the* ***ACTIVITIES*** *and* ***RESOURCES*** *blocks in the LFA.* |

**SUSTAINABILITY**

This section should address the following:

| **IMPORTANT INFORMATION TO INCLUDE** |
| --- |
| How will the project's success be judged? |
| Does the project have a fixed life or will it sustain itself later on? |
| If the project has a fixed life, demonstrate why the required investment justifies the return. |
| Where will the resources come from? |
| Do you have a long-term fundraising strategy?  *(Consult the fund development unit for your fundraising strategy).* |
| Is there a synergetic organisation/community to take over the project? |
| Will the initial investment be wasted if the sustainability plan fails? |

**EVALUATION**

Describe the plan to ensure that the project meets the goals and objectives that have been set. The plan does not have to be too elaborate, but it is important to show to donors that you have not forgotten about it.

| **IMPORTANT INFORMATION TO INCLUDE** |
| --- |
| How will the success of the project be judged? |
| When will you report? |
| How will the data be collected and analysed? |
| Will there be one evaluation or a series? Why? |
| Who will conduct the evaluation? |
| Is there any value in disseminating the information to others? |
| The target audience for disseminating information? |
| The mechanism to disseminate information. |
| Will you evaluate the objectives and outcomes? |
| Will you analyse and assess the processes, methods, and strategies? |
| Where is the evidence that the project delivered what it promised?  *Consult the* ***MEANS OF VERIFICATION*** *and* ***PERFORMANCE INDICATORS*** *columns in the LFA.* |
| *Never use a % without a base number.* |
| *Consult and/or compile the Excel project chart.* |

**CONCLUSION**

This is your last chance to really sell your project. Your conclusion should:

|  |
| --- |
| **IMPORTANT INFORMATION TO INCLUDE** |
| Shift from goals to aims. |
| Shift from outputs to benefits. |
| Reiterate XXX's commitment. |
| What will the benefits be? |
| What will change? |
| How will the project help the donor to realise their vision and goals? |
| Last sentence must be powerful! |
| *Length: half a page.* |

**APPENDICES**

The appendices are secondary documents that support the proposal. Attach the appendices in separate electronic files. The appendices should include the following:

|  |
| --- |
| **APENDICES / ATTACHMENTS** |
| Résumés of project team. |
| Complete project budget. |
| Endorsement letters. |
| LFA (and/or Success Equation, ToC). |
| Project marketing material, e.g. brochures, pamphlets, etc. |
| Project team/organisational chart, |
| Partner marketing material, |
| Photographs relevant to the project, |
| Quotes for equipment/ external services, |