Preparing for submission

Writing a 'successful' proposal is mostly about thinking.
The actual wordsmithing part is far less important to the final result than many people imagine.
(Haydon, R. 2007, 'The Shredder Test', p. 12)

1. **Thinking is key –** If you do not know what your 'big idea' is for a submission, how can others be expected to understand it. 'Focusing down' is important for two key reasons, 1) it will help you and a potential funder ensure you are a 'good match' (remember many philanthropic funds are managed by a Trustee who match proposals to funds), and 2) it will help you speak and write about your project. 'Focusing down' is not necessarily a once-off process, but to approach a submission without taking the time to 'think' is a big mistake. Here are four related strategies to help with crystallising your 'big idea':

   a) *Start with the end in mind:* Can you write a press release about your project? What would be the headline?

   b) *'Killer points'*: An advisor to Blair said that when he was asked to write a briefing or meet with the Prime Minister, he had to succinctly provide his 'best' five killer points about an issue.

   c) *Ideas book*: Keep a small notebook handy. The number of good ideas you get when you least expect them are too precious to let evaporate into the ether (or leave to memory alone!). Preparing for a submission does not just have to start when a funding round 'opens'. Remember, this is not just about getting more funds into your school. It is about ensuring that the funds you do get in and, as a consequence, what you have to deliver are a good match to your school's values, priorities and capacity.

   d) *Talk with others*: This seems so obvious, but the reason behind talking with others is that the questions people (funders, colleagues, family members!) ask can lead to better formed and/or different thoughts.

2. **Organisation is key** – start with the application **GUIDELINES** and map out a plan of points you need to include, as well as any essential documentation (e.g. financial statements etc.). Be clear on all the conditions of funding to ensure that you can meet them before you start:

   a) *Write a list* – as you set out, make a list of things you will need to do once you have written your submission (e.g. signatures from whom? photocopies of what? How many copies? covering letter required? etc.) This will be a handy cross-check before you finally submit.

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3. **Understand the funder** – it is important to understand the philosophy and priorities of the funding body from whom you are seeking your grant. This will help you target your submission appropriately and clarify why yours would be a good project for them to support – show how you share their values. A simple strategy is to use a priorities / values matrix and use the funder's current information on their website to map their priorities and values against what you are proposing:

Funder priorities & values	Our project/initiative idea	Compatibility match
e.g. Capacity building	e.g. Mentoring program	✓
Youth	Year 11 & 12 students	✓
Rural and remote	City location	X
Can/should we modify our project? (reasons 'for' and 'against')		

If possible, get hold of a previously successful proposal as a guide. If you are sending applications to more than one organisation, make sure they are tailored to the individual organisation; DON'T send the same submission to all.

Every foundation is different so always check the guidelines and application requirements before submitting an application. Don't prepare a standard application and send it off to every foundation you can find.

Many foundations welcome (and at times strongly advise) contact before an application is submitted. This will save you time writing an application if in fact it is not suitable. Wherever possible, contact the foundation to discuss your application before writing your application.

(Jane Kenny, Sydney Community Foundation)

4. **Do your research** – Once you have clarified what you are proposing, do some research 'around' it to identify not only the specific need for your school but what the benefits will be (perhaps even beyond your school); identify any similar projects that yours might learn from etc.

5. **Look for support** – if appropriate (and asked for by the funder), gather letters of support from those who will indirectly benefit from the project i.e. parents, community groups etc. This will help prove your credibility as well as demonstrate a broader impact of your project.

6. *Be realistic* – be sure that what you are proposing can be achieved with the human resourcing available, within any specified time-frame and with the funding being requested. Funding selection committees will be well acquainted with identifying any potential risk of an incomplete project. It is important to include the full cost in your application. As Jane Kenny (Sydney Community Foundation) notes, *'No funder wants to make a grant to a project that falls over part way through because of insufficient funds'.*

Writing your submission

Writing a proposal is just like having a conversation with a buyer.
The only difference is that it's done in writing, rather than face to face.
(Haydon, R. 2007, 'The Shredder Test', p. 12)

1. **ALWAYS use the guidelines and application forms provided by the funder** – some funding bodies will not accept applications if they are not completed within their own templates. If it is not clear whether they have application forms, contact the funder directly to make sure – this could save you a lot of disappointment down the track.

2. **Follow the guidelines**: Do not think that your project and/or organisation are so unique that it doesn't matter if you fall outside the guidelines. It does, so if you cannot meet the criteria outlined by the funder, look for another funder who is a better match. Only provide what you are asked to provide. Funders have spent time thinking about their guidelines and what they require from applicants (hence you'll find that many funders update this information regularly). What you think is important may not be what the funder thinks is important to them at this point in time. Applicants need to respect and acknowledge this fact by only providing the information the funder seeks.

3. **Again, organisation is key** – map out the various sections of your proposal before you start and make sure you stick to the plan. Here is a guide to some of the important elements you may be asked to include:

   - *Proposal statement (a brief summary)* – be as clear and concise as possible about what you are proposing from the outset (say who the project will benefit and how much it will cost; why is your proposal 'special/distinct'?) – you can provide more detail in the body of your proposal.

   - *Why is the funding needed?* - what 'gap' will it fill or problem will it solve? Include any relevant data, and any alternate ways considered to fill this need (why are they not appropriate).

   - *Aim* - What do you hope to achieve? Who will benefit and why (can you support that statement with clear evidence)? Are there wider implications for other schools/areas?

   - *Implementation plan and budget*– explain how funding will be effectively allocated and against what specific timeframe (include specific start and end dates). Identify who will be the key contact person for the project and how will they keep the funder up-to-date with developments or changes. This might be done in an action table that is clear and easy to read. If necessary, identify whether this project will require ongoing support once funding runs out and how you propose to seek that support.

   - *Supporting organisations* – identify any other schools/agencies/businesses who are supporting or auspicing or collaborating in this proposal. What is their interest and how will they support (e.g. in-kind, additional funds etc.)

- *The project 'team'* – who will be directly involved in the project and why? (list names and positions and identify a 'project manager'; nominate who will be accountable for expenditure/reporting etc.).

- *Evaluating success* – identify how you will determine whether your project has been successful.

If there is no application template, then you may want to also keep these strategies in mind;

a) *Summary boxes*: Depending on the length of the proposal, at the end of each section of your proposal in a small shaded box succinctly reiterate the key points (remember the advisor to Blair's strategy)

b) *Breakout boxes*: Similar to a summary box, but these boxes containing 'killer points' from your proposal sit next to the text throughout the proposal.

4. **Address the funders evaluation criteria** – it is very important to make sure you address any evaluation criteria in the various sections of your proposal – make it easy for the funder to 'tick' these off as they go through your proposal.

5. **Use sequenced and clear headings** – funding committees are often constrained by time and will be required to 'wade' through a pile of applications; it is important that they are able to 'grasp' the major elements of your proposal and how it links with their funding philosophy easily.

6. **Appendices** – Remember to keep the body of your proposal as concise as possible and consider adding more detailed evidence/supporting material in an appendices/attachment. However, **MAKE SURE APPENDICES/ATTACHMENTS ARE ALLOWED** – some funding bodies will not permit additional material beyond the application form.

7. **Style and language** – keep the language simple and sentences short; don't over-complicate the proposal with sophisticated terminology and jargon. You want to be sure the funder, who may know nothing about your school, understands what you are telling them. There should be no room for misinterpretation. If you need to use acronyms, make sure you write the full name/title in full from the outset.*.*

8. **Answer ALL questions** – never leave areas blank, the questions are there for a specific reason. Again, if you are unclear, contact the funder.

9. **Proof-read** – allow time for someone else (preferably someone not involved in the project you are proposing) to proof-read your proposal. This will help identify any errors as well as assist in determining whether what you propose is clear.

10. **Submit applications according to guidelines (pay attention to the details)** – many funding bodies are very clear about how they want to receive your submission (e.g. mail, email, fax etc.); how many copies they want (some funders even specify the number plus whether they should be bound, or stapled and so on); and the deadlines. Make sure you allow plenty of time for delivery as most funding bodies are very clear that they will not accept late applications.

After proposal is submitted

1. **Be patient** – More often than not funders clearly outline their timelines and processes for assessing and contacting applicants – keep these to hand. In some cases, the funder asks you to call if you have not heard that your application has been received. However, note that reviewing submissions can take time – they will contact you when they are ready.

2. **Keep the funder up-dated** – Don't just 'cut and run' once you have been successful at securing funds. Build into your plan a process for keeping the funder up-dated as to how the project is travelling. This helps develop relationships and also can alert the funder to any changes to the use of funds before the project ends.

3. **Meet reporting requirements –** Follow-through is essential. Many funders require that as a condition of funding (and any subsequent funding), the applicant fills in an acquittal form at the completion of the project or funding period. These reports tend to cover such issues as, 'how funds have been spent', 'whether what the applicant set out to do was achieved and, if not, the reasons why'.