

**Guide to Successful Project or Proposal Planning:
Asking a Company or a Philanthropic Foundation for Support
July 2008**

Crafting a quality proposal to advance education, address a societal problem, and/or build economic prosperity is key to securing private funds. The following guide outlines the information to frame your opportunity. We encourage you not to complete this information prior to calling us, but recognize the aspects and thought behind successful philanthropy. Corporate and Foundation Relations will assist throughout the process – strategy, research, solicitation, and communication.

1) Background on the Requester/Applicant

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| <input type="checkbox"/> Who is applying for funding | <input type="checkbox"/> Applicant's qualifications |
| <input type="checkbox"/> VTF purpose & goals | <input type="checkbox"/> Repeat for collaborative entities |
| <input type="checkbox"/> VT programs and activities | <input type="checkbox"/> Documents of collaborative efforts / agreements between applicants and collaborative entities |
| <input type="checkbox"/> VT clients or constituents | <input type="checkbox"/> Statements of support from collaborative entities |
| <input type="checkbox"/> VT previous accomplishments | |

2) Background on the Corporation or Foundation

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|---|--|
| <input type="checkbox"/> Motivation -- What are the most important things we need to know about this prospect? | <input type="checkbox"/> What is their continuing involvement with VT? |
| <input type="checkbox"/> Why are they interested in awarding this gift for this purpose? | <input type="checkbox"/> What values shape their philanthropy? |
| <input type="checkbox"/> What was their experience with VT (e.g. recruiting, previous donations, research sponsor, etc.)? | <input type="checkbox"/> What issues / causes are important to them? |
| | <input type="checkbox"/> What are their other philanthropic interests? |
| | <input type="checkbox"/> How do they want to give? |

3) Problem Statements of Needs Assessment

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| <input type="checkbox"/> Simple, concise statement of issue(s) the program will address | <input type="checkbox"/> Does not rely on "lack of the requested program" argument |
| <input type="checkbox"/> State in terms of client's needs and problems | <input type="checkbox"/> Persuasive and "sets-up" program goals and objectives |
| <input type="checkbox"/> Verifiable – supported by evidence, statement of authorities | <input type="checkbox"/> Why this program is the "answer" |

4) Program Description

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| <input type="checkbox"/> Explain program – concrete examples | <input type="checkbox"/> How will program help donor achieve its goals & objectives |
| <input type="checkbox"/> Why the program is important/needed, different from problem solving and enables the program to be justified on its own merits | |

Invent the Future

5) Program Goals/Mission

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| <input type="checkbox"/> Respond to problem/need | <input type="checkbox"/> What is Not measurable |
| <input type="checkbox"/> Long-range benefits | |

6) Program Objectives

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| <input type="checkbox"/> At least one objective per problem/need | <input type="checkbox"/> What will the donor create at VT with this gift |
| <input type="checkbox"/> Objectives have measurable outcomes | <input type="checkbox"/> How will the gift benefit students, faculty, or the university |
| <input type="checkbox"/> Describe clients/population that will benefit | <input type="checkbox"/> Timetable for objectives |
| <input type="checkbox"/> Impact -- Who or what will the gift benefit | |

7) Methods

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|---|--|
| <input type="checkbox"/> Describes program activities (covering each objective) | <input type="checkbox"/> Activities should yield desired objectives |
| <input type="checkbox"/> Why activities are chosen | <input type="checkbox"/> Describe staffing |
| <input type="checkbox"/> State sequence of activities | <input type="checkbox"/> Describe clients and client selection process |
| | <input type="checkbox"/> Timeline for activities |

8) Evaluation

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|--|--|
| <input type="checkbox"/> Plan for evaluating accomplishments | <input type="checkbox"/> Who will perform evaluation and how they are chosen |
| <input type="checkbox"/> Plan to evaluate and modify methods/objectives during course of program | <input type="checkbox"/> Criteria for success |
| <input type="checkbox"/> How data gathered | <input type="checkbox"/> Describe evaluation reports, frequency, and scope |
| <input type="checkbox"/> How data analyzed | |

9) Future Funding

- | | |
|--|---|
| <input type="checkbox"/> Plan to fund program if continued | <input type="checkbox"/> How will maintenance and future program costs be covered |
|--|---|

10) Budget

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|--|---|
| <input type="checkbox"/> Total program cost | <input type="checkbox"/> Proposal narrative and line-item budget - covers goals, objectives, and methods |
| <input type="checkbox"/> Total fund-raising goal | <input type="checkbox"/> Includes all funding sources: VT in-kind, other funding sources, volunteers, etc. |
| <input type="checkbox"/> Specific amount request from funding organization | <input type="checkbox"/> Includes all costs: consultants, all salaries/benefits, building materials, equipment, and other non-personnel costs |
| <input type="checkbox"/> Other sources for additional amount to be raised | <input type="checkbox"/> What realistically will fund program |
| <input type="checkbox"/> Detailed line-item budget over timeline | |

11) Close

- Restate ask and summarize justification