Wells Mountain Initiative

Community Development Growth Grant
Written Proposal Guidelines

All applicants are required to prepare an official written proposal. This proposal should include the following sections. Use these guidelines to help prepare a strong written proposal. If you have any questions about the content to include in your written proposal, write to nicole@wellsmountain.com.

Proposal Sections	Elements to Include
Section 1: Title Page & Abstract This page should provide an overview of key proposal information. Consider providing abstract information in bullet form. Keep it short and simple. You will provide additional details for all of these elements in the next sections.	**Include:** o Proposal title (Be creative!) o Applicant's full name o Applicant's country o Location of initiative o Total cost to implement the proposal in local currency and USD o Grant amount requested in local currency and USD o Date of Submission: MM/DD/YYYY
Section 2: Historical Overview Use this as an opportunity to introduce your existing business, organization, or on-going community project.	**Document the following:** o Short summary of your existing business, organization, on-going project o How was the WMI Seed Grant/Micro-Grant successfully used o Create a bullet list of successes achieved to date o List <u>current</u> staff/volunteers, their titles, if they work part-time or full-time, and indicate if they are paid or unpaid o List staff/volunteers, their titles, if they worked part-time or full-time, and indicate if they were paid or unpaid in <u>2019 (pre-COVID)</u>, <u>2020</u> and currently in <u>2021.</u> o Provide links to any online presences (website, Facebook page, LinkedIn page, etc.)
Section 3: Needs Statement & Assessment for Growth/Expansion The needs statement and assessment forms the justification for the growth/expansion. This should include data related to beneficiaries/customers.	**Evidence could include forms of:** o Demographic data o Statistics from reputable sources o Testimonials from experts or professionals within the area(s) of need o Surveys and results o Observational data o Experiential statements o Financial data and projections

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Section 4: SMART Goals and Objectives Consider the needs identified and create SMART goals and objectives related to the growth/expansion of your existing initiative.	**Think strategically about the following:** o Goals are statements of the outcome you are trying to accomplish o Objectives are defined statements related to actions that you will take to work towards achieving your goals o Use the SMART Goals & Objectives handout to guide you with creating goals and objectives **Handout:** http://bit.ly/CDG_Growth_SMART
Section 5: SWOT Analysis Evaluate your proposal with the SWOT strategic planning technique. Identify strengths, weaknesses, opportunities, and threats related to business competition/project planning and implementation..	**Review the SWOT analysis handout and utilize this strategy to write about each of the following related to your expansion/growth plan:** o Strengths (Internal) o Weaknesses (Internal) o Opportunities (External) o Threats (External) **Handout:** http://bit.ly/CDG_Growth_SWOTAnalysis
Section 6: Growth/Expansion Plan & Activities Relate your goals and objectives to explain the activities, procedures, processes, development of training materials, expansion of staff, meetings or events that will take place.	**What do you plan to do:** o Provide a narrative of your growth/expansion plan o List each goal and detail what will happen (where, when, who will assist, and how activities relate to meeting goals and objectives) to aid in the growth/expansion of your existing initiative o Include how COVID-19 and current restrictions within your nation have, are, or could impact your plans and activities. o How will you mitigate COVID-19 impacts to work towards continued growth and expansion?
Section 7: Partnerships & Assistance What local, state, regional, national, or international resources are available to support your proposal. Consider knowledge contributions/mentorship, funding, resources, volunteers, in-kind donations, etc. Research and identify individuals and organizations (both for-profit and nonprofit) that would be interested in your proposal.	**List:** o The way in which each person, group, organization, or business could be involved o In-kind donations (supplies, other resources, time, etc.) that could be provided by specific people or organizations o Funding sources that are available
Section 8: Sustainability Consider the larger impact of your proposal and ways in which you can continue providing opportunities to learn, to engage, to train, to provide services, or expand your business.	**Discuss:** o How will this grant help you build structures to increase sustainability? o How will the existing initiative continue to operate once these grant funds have been spent?

	o Are there income-generating activities to support on-going expenses? o Provide specifics and financial projections
Section 9: Measurement & Evaluation Define ways in which you can measure specific levels of knowledge, attendance, health issues, profits, increase of clients, etc. before implementing your proposal and after. Your goal is to collect data to showcase if your initiative created elements of change.	**Create a list of M&E indicators that includes:** o What will be measured in order to assess progress towards achieving the goals? o How will each of these indicators be measured? o When and how will data collection take place? o Are resources needed to complete this process? o Is a pre-and post-knowledge survey relevant for your initiative? o Does your business currently solicit feedback and ideas from customers?

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Required Supporting Documents & Templates

Supporting Document 1: Planning Timeline* Define what steps will need to take place in order to implement the proposal. Detail the action steps on the Planning Timeline template.	**On the template include:** o Project stage o Short description of the task o Responsible person o Date the task will be started o Date the task should be completed o Result of the completed task **Template:** https://bit.ly/38lrolQ
Supporting Document 2: Budget(s)* All applicants will complete the Budget Proposal. On this excel sheet template you will list and itemize all anticipated funding sources (revenue) and all anticipated costs (expenses). Proposals that will be implemented over the course of more than one month are required to also complete a Monthly Expense & Revenue Breakdown Budget. If your proposal is for a program that will run for three months, you will create a budget for these three months.	**Use the template for the following:** Use your local currency to create both budgets. **Budget Proposal:** Consider all expenses that the proposal could incur. Itemize these expenses. List funds available and expected funds from other sources to support the initiative. This will require on the ground work to build support and investment for your proposal. **Monthly Expense & Revenue Breakdown Budget:** Use this template to determine what expenses you will incur and when. Additionally, list when you will receive funding support or estimate incoming monthly revenue.

If your proposal is for on-going activities, please complete a 12-month budget.	**Template:** https://bit.ly/3gEtQs2
Supporting Document 3: Financial Records - Fiscal Year of 2019*	***Optional (but highlight suggested): Provide complete fiscal records for the year of 2019.** The committee understands that since the start of the global COVID-19 pandemic groups, organizations and businesses have been significantly impacted. If your group, organization or business has fiscal records from 2019, please include them. This information will be used as a measure of fiscal status pre-COVID interruptions and economic downturns.
Supporting Document 4: Financial Records - Fiscal Year of 2020	**Provide complete fiscal records for the year of 2020.** The review committee will use this information to understand the fiscal health of your initiative. The committee understands that the global COVID-19 pandemic has financially impacted groups, organizations and businesses significantly in 2020.
Supporting Document 5: Financial Records - January 2021 - August 2021	**Provide financial records from January 2021 - August 2021.** These records will be reviewed with the understanding that the COVID-19 global pandemic may have vastly changed your 2021 financial goals, projections and targets.
Additional Supporting Documents	If you would like to include additional supporting documents, you will have the ability to upload them within the application form. Suggested supporting documents include: ➢ Registration certificates ➢ List of leaders/employees and their roles ➢ List of board members ➢ Partnership agreement letters ➢ Registration certificate ➢ Financial audit report ➢ Tax clearance certificate ➢ Permission/community approval letter ➢ Annual report ➢ Logo ➢ Social media URLs