



## General Support Proposal Guidelines

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The Heising-Simons Foundation reviews proposals on a rolling basis. Please work with your program officer (PO) and/or program associate (PA) to determine the best date to submit your proposal.

Proposals are reviewed by Foundation staff who may contact other individuals for comments, such as colleagues in the community or in a relevant field, other funders, or Foundation grantees. If you prefer that we not do so, please let your PO or PA know.

Please submit your proposal via our online portal, or, if you have not been set up with portal access, email your proposal to your PO and PA. If you have any questions, email your PO and/or PA, or call the Foundation at (650) 887- 0277.

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### Proposal Submission Checklist

You may submit materials developed for other funders, but your proposal to the Foundation must contain the documents and details outlined below. Please do not combine documents into one pdf.

#### 1. [Proposal Cover Sheet](#)

#### 2. **Proposal Narrative**

You may submit an organization annual report or similar document, or please include the following:

- **Organizational Information**

- History and purpose of the organization.
- People and groups the organization serves.
- Organizational priorities, programs and related goals, objectives, and geographic areas served.

- **Personnel**

- A list of senior personnel and their qualifications.
- Names and principal affiliations of directors or trustees of the organization (not required for public agencies). This can be a separate document or a hyperlink.

#### 3. **Organization Budget**

An organizational budget which includes a list of received and projected funding sources and amounts for the current fiscal year

#### 4. **Financial Statements**

- The most recently audited financial statements. If the most recent audited financial statements are not within 12 months of the proposed start of the grant, then also include unaudited financial statements for the organization's most recent fiscal year.
- If only unaudited financials are available, please include a balance sheet and statement of revenue and expenses for the organization's most recent fiscal year, signed and dated by an authorized officer of the organization.

Program staff may ask for additional supporting materials that would be helpful in evaluating the proposal.