Project Support Proposal Guidelines

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.

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** or **Proposal Cover Sheet for Fiscal Sponsors**

2. **Proposal Narrative**
   Please include the following:

   - **Organizational Background**
     - The history and purpose of the organization.
     - The people and groups the organization serves.

   - **Context and Rationale.** Describe the larger landscape and context for the proposed grant activities

   - **Specific Request**
     - Proposed project, program, or department for which the organization is seeking funding and its objectives.
     - Proposed project/program/department partners and their anticipated contribution.
     - Outcomes the organization hopes to achieve during the grant period.
     - Geographic area to be served.
     - A timeline of any relevant activities, milestones, anticipated plans and methods of evaluation, dissemination of results, and/or any work products that will be generated.

   - **Personnel**
     - A list of key personnel who will implement the grant and their qualifications (e.g., curriculum vitae, resume, or biography).
     - Names and principal affiliations of directors or trustees of the organization (not required for public agencies). This can be in the narrative, a separate document, or a hyperlink to a website.

3. **Project Budget**
   - Include the total proposed project/program/department expenses and a list of received and projected funding sources and amounts over the duration of the request
   - If the proposal includes distinct subcomponents, the proposal budget may include separate budgets for each subcomponent; however, please include a summary budget for the entire project
   - There is no set minimum or maximum indirect cost rate for support to non-universities
   - *Only if requested by your PO*, you may include a proposed allocation of Foundation resources to identified budget expense categories or project subcomponents.

4. **Organization Budget** *Not applicable for government agencies and universities.*
   Organizational budget(s), which includes a list of received and projected funding sources and amounts, covering the duration of the request.

5. **Financial Statements**
   - The most recently audited financial statements. If the most recent audited financial statements are not dated 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.

Additional Instructions

- **Colleges and Universities**
  - must provide an institutional endorsement from an authorized university office;
  - must show an indirect cost rate no higher than 15% of the direct costs;
  - do not need to submit an organizational budget; and
  - do not need to submit financial statements.

- **Fiscal Sponsors** must provide:
  - a signed copy of the fiscal sponsorship certification letter; AND
  - an explanation of the fiscal sponsor relationship outlining the discretion and control either:
    - in a cover letter from the fiscal sponsor on fiscal sponsor letterhead, OR
    - outlined in the proposal narrative.

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