



Proposal Guidelines

The Foundation reviews proposals on a rolling basis. Please work with your program officer and/or program associate 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 do not do so, please let your program officer (PO) or program associate (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.

Checklist

Your PO or PA may accept proposals written for other funders; if so, you may still need to complete the Proposal Cover Sheet. If not submitting a proposal written for other funders, your proposal needs to contain the following documents. Please do not combine documents into one pdf.

1. [Proposal Cover Sheet](#)

2. **Proposal Narrative**

For general support requests, you may submit an organization annual report or similar document. Otherwise, please include the following:

- **Context and Rationale**
 - Describe the larger landscape for this grant.
- **Organizational Background**
 - The history and purpose of the organization.
 - The people and groups the organization serves.
- **Specific Request**
 - The proposed program or activities and its objectives and goals.
 - Proposed program partners.
 - Outcomes you hope to achieve during the grant period.
 - Geographic area to be served.
 - Outline of program phases, from beginning to end. If relevant, provide a basic timeline for key activities.
 - Anticipated plans and methods of evaluation, if relevant, or dissemination of results, or any work products that will be generated.
- **Personnel**
 - A list of senior 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.
 - **Additional Information**
 - Your PO might have additional questions to be addressed in the proposal narrative.
- 3. Project Budget** *Not applicable for general support requests.*
- Dated, detailed, and annotated.
 - Indirect costs must be a line item in the project budget. Indirect costs cannot exceed 15 percent of the direct costs for project support grants. Please click here for the full policy.
 - The Heising-Simons Foundation does not earmark grant funds for lobbying. If your request is for project support and contains lobbying activities, please talk to your PO or PA. If you are unsure if your activities constitute lobbying, please see the Alliance for Justice for technical assistance.
- 4. Organization Budget**
- A dated organizational budget for the fiscal year that covers the duration of the request.
 - A list of received and projected income for the organization for the current fiscal year.
- 5. Financial Statements**
- The most recent financial statements, preferably audited. If the most recent audited financial statement is not within 12 months of the start of the grant, then also include an unaudited statement for your most recent fiscal year.
 - If only unaudited financials are available, please include balance sheet and statements of revenue and expenses for your most recent fiscal year, signed and dated.
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Additional Attachments

- **Colleges and universities** must provide written institutional endorsement from the appropriate, authorized university office.
 - **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.
 - Any other supporting materials that would be helpful in evaluating the proposal.
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