

# Proposal Guidelines

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## Review Process

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 or program associate know.

Please email your proposal to your program officer and program associate. If you have any questions, email your program officer and/or program associate, or call the Foundation at (650) 887- 0277.

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## Checklist

Your proposal needs to contain the following documents. Please do not combine documents into one pdf.

1. [Proposal Cover Sheet](#) (in Word)
2. **Proposal Narrative** (in Word)
  - **Board List (Directors and Trustees)**. This can be provided in the narrative or in a separate attachment.
3. **Project Budget** (in Excel) *Not applicable for general support requests.*
4. **Organization Budget** (in Excel)
5. **Financial Statements**

## Additional Attachments

- Colleges and universities should provide written institutional endorsement from the appropriate, authorized university office.
  - Fiscal sponsors should provide a copy of the MOU or contract with the sponsored project.
  - Any other supporting materials that would be helpful in evaluating the proposal.
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## 1. Proposal Narrative

For the proposal narrative please include the following information:

- **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** *For general support requests, please defer to discussions with your program officer on how best to complete this section.*
  - The proposed program and its objectives.
  - The overall goal of the proposed program.

- Names of individuals/organizations the proposed program will serve.
- Proposed program partners.
- Key strategies you plan to develop and implement (i.e., what activities will be undertaken through the grant?).
- 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).
- **Additional Information**
  - Your program officer might have additional questions that need to be addressed in the proposal narrative. Check with your program officer prior to drafting your proposal.

**2. Project Budget** *Not applicable for general support requests.*

- Dated, detailed, and annotated.
- Requests for general support should not include a project budget.
- 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 program officer or program associate. If you are unsure if your activities constitute lobbying, please see the [Alliance for Justice](#) for technical assistance.

**3. Organization Budget**

- A dated organizational budget for the fiscal year that covers the duration of the project.
- A list of the sources of organization funds, received and projected—including both public and private amounts for the current fiscal year.

**4. Financial Statements**

- The most recent financial statement, 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.
- 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.