

AGM Common Proposal Form

Before writing your proposal using AGM's Common Proposal Form, please read this page carefully. These tips and suggestions are written with you, the writer, in mind.

When writing a proposal, make sure that the goals, objectives, and amount requested match the criteria of the funder you are approaching. Be strategic!

Understanding that many foundations have small staff sizes, calling a foundation or corporate giving program to seek their advice if you do have a concern about a particular question may be useful.

Do Your Homework!
Keep these following tips in mind:

1. Research each funder's grantmaking philosophy, program interests, and criteria.
2. Be aware of each funder's application process, including timetable and preferred method of initial contact.
3. Include a cover letter, introducing your organization and stating the dollar request.
(Check with each funder to see if they have a separate cover sheet.)
4. Follow any specific instructions from the funder.

There are many resources to help you in your research. Utilize them! Following are some suggestions:

- Call or write each funder to obtain a copy of its funding guidelines
- Use AGM's *Massachusetts Grantmakers Directory*, profiling nearly 500 funding organizations
- Use National Directories
- Visit AGM's Resource Center for Philanthropy in Boston, New England's funding research library
- Join AGM's Partners Program or Partners Plus and receive the quarterly publication *Partners' Update*, which updates lists of funders accepting the Common Proposal Form
- Utilize AGMConnect found at www.agmconnect.org

Associated Grantmakers of Massachusetts (AGM) is a statewide association of corporate and foundation grantmakers. AGM's mission is to support and advance effective and responsible philanthropy throughout the Commonwealth.

AGM DOES NOT MAKE GRANTS. PLEASE DO NOT SEND FUNDING REQUESTS TO AGM.

Feel free to share the Common Proposal Form with a nonprofit colleague!

Cover Summary

Date: _____

1. Legal name of organization, address, and name of executive director:

2. IRS 501(c)(3) nonprofit? (Please circle) YES NO

2a. If no, identify your fiscal agent and attach the written agreement from the fiscal agent. (Funders using this form may have special requirements as to the use of a fiscal agent, or may not permit such use.)

3. Contact person and title: _____

4. Phone: _____ FAX: _____ Email: _____

5. AMOUNT REQUESTED: \$ _____

6. TYPE OF REQUEST (operating, project, capital, other): _____

7. State your organization's mission:

8. No more than four sentences summarizing the proposal and its strategic link with this funder (Include the name of the project or capital campaign, if applicable):

9. List the proposal's target population, constituents, and geographic communities:

10. Total number of board members: _____ Total number of volunteers: _____

11. Total number of staff: Full-time _____ Part-time _____

12. Total annual organizational budget: \$ _____ Fiscal Year End ___/___/___

13. Project or capital budget (if applicable): \$ _____

14. The period this grant will cover: ___/___ to ___/___

15. United Way affiliate? (Please circle): YES NO

16. List any previous support from this funder in the last five years.

Proposal Narrative

Up to 10 pages is suggested. Check to see that the goals, objectives, and amount requested in your proposal match the criteria of the funder you are approaching. The following questions are ones that funders have identified as important information to answer. **While it is necessary to encompass all the following information in the proposal narrative, you may want to change the order in which you answer these questions.**

Profile of your organization and of your request

- ***If you are requesting operating support, please provide information about your organization's overall programs and activities.***
 - ***If you are requesting project or capital support, please provide information for that specific project or capital request.***
1. Brief summary of organization's history, goals, and key achievements.
 2. Overview of organization's structure and programs, including board, staff, and volunteer involvement.
 3. Describe your organization's constituents for the organization overall, or, for a specific project. For example, total number and breakdown by age, gender, race/ethnicity, income levels, disabilities, geography, language spoken, or other criteria relevant to your organization or project.
 4. Describe the community or regional need(s) and/or challenges that this effort will address. What is the level and nature of involvement of the community-at-large?
 5. Description of the specific request that includes goals and objectives. (If it's a project request, provide a profile of the project)
 6. Specific activities and timetable for meeting your stated objectives.
 7. Future plan for sustaining this effort and strategy for building your funding base.
 8. Who are your staff and volunteers and what are their qualifications?
 9. If applicable, identify organizations that you collaborate with to address the issue(s) in this proposal.

Evaluation

10. Define your criteria for success for the organization, project, or capital campaign. State how you will measure your success in the short-term and in the long-term. What tool(s) will be used to evaluate your program or organization? What is your strategy for implementing the evaluation process?

Remember P Refer to each funder's guidelines to see if additional information is required

Attachments

All of the following attachments must accompany the proposal

1. IRS letter confirming tax-exempt status - 501(c)(3) and 509(a).
2. Current board list with relevant background, affiliations, town residence, and number of times a year it meets
3. Financial information:
 - Total board approved organizational budget for the fiscal year(s) (see page 4 for details)
 - If seeking project or capital support, include project or capital budget for fiscal year(s)
 - Most recent independent audit or account review (as required by law)*
 - Year-to-date financial statement for the current fiscal year
 - List companies and foundations being approached to fund this proposal, with dollar amounts indicating which sources are committed, pending, or anticipated

Important P Refer to each funder's guidelines to see if additional attachments, such as diversity forms, IRS form 990, or resumes are required.

*Footnote: according to the Massachusetts Attorney General's Division of Public Charities, nonprofits with revenues of equal to or more than \$250,000 must conduct an annual independent audit. Those with revenues between \$100,000 and \$249,999 may conduct an account review in lieu of an independent audit. Any nonprofit with revenues of \$99,999 or less is not required to conduct an independent audit or an account review. For more information, call the Massachusetts Attorney General's Office at 617.727.2200.

Proposal Budget/Budget Narrative

2 PAGES MAXIMUM

Before You Begin! Important Note:

If you already prepare organizational, project, or capital budgets which include revenues and expenses, you may submit them in their original form, or use the following sample.

1. Time period budget covers:
2. Revenue: provide a line item revenue statement for all applicable budget categories.
 - a. Grants and Contracts
 - Local Government
 - State Government
 - Federal Government
 - Foundations and Corporations
 - United Way and Other Federated Campaigns
 - b. Other Fundraising and Earned Income
 - Individuals
 - Events
 - c. Earned Income
 - Publications and Products
 - Membership Income
 - Fees
3. Expenses: provide a line item expense budget, with narrative footnotes for those applicable items which need further explanation. Typical line items might include:
 - Salaries (specify number of full time equivalents)
 - Payroll Taxes
 - Fringe Benefits
 - Consultants and Professional Fees
 - Insurance
 - Travel/Transportation
 - Equipment
 - Supplies
 - Printing and Copying
 - Telephone and Fax
 - Postage and Delivery
 - Rent
 - Utilities
 - Maintenance
 - Evaluation
 - Staff Development and Training
 - Child Care
 - Administrative Overhead
4. In-Kind Support

AGM Common Proposal Form Users

The Common Proposal Form was inaugurated on January 1, 1995, but funders can adopt it at any time. As of January 13, 2000, the following funders have notified AGM that they accept the Common Proposal Form:

The Paul and Edith Babson Foundation
BankBoston
BankBoston, Charitable Trusts
Frank M. Barnard Foundation
The Barr Foundation
Bell Atlantic Foundation
Berkshire-Taconic Community Foundation
The Blossom Fund
The Boston Company
The Boston Edison Foundation
The Boston Foundation
The Boston Globe Foundation
Bushrod H. Campbell and Adah F. Hall
Charity Fund
Cabot Family Charitable Trust Foundation
Roberta M. Childs Charitable Foundation
City of Boston, Trustee of Public Charitable Trusts
Clipper Ship Foundation, Inc.
The Cloud Foundation
Community Foundation of Cape Cod
Jessie B. Cox Charitable Trust
Lewis Anthony Dexter Environmental Trust
Digital Equipment Corporation
Charles Stark Draper Laboratory, Inc.
The Dunn Foundation
Eastern Enterprises / Boston Gas Company
Eastern Bank Charitable Foundation
Fleet Investment Management
Orville W. Forté Charitable Foundation, Inc.
The Fuller Foundation
The Gillette Company
David Greenwalt Charitable Trust
John Hancock Mutual Life Insurance Company
Charles Hayden Foundation
Houghton Mifflin Company
The Hyams Foundation, Inc.
IBM/Lotus
Island Foundation, Inc.

Leaves of Grass Foundation
Arthur D. Little Foundation, Inc.
Loomis, Sayles & Company, L.P.
Massachusetts Maternity and Foundling
Hospital Corporation
Massachusetts Environmental Trust
Merck Family Fund
The Millipore Foundation
NEBS Foundation
New England Financial
Ottinger Foundation
The Theodore Edson Parker Foundation
The Ellis L. Phillips Foundation
George A. Ramlose Foundation
A.C. Ratshesky Foundation
Raytheon Company
The Remmer Family Foundation
Mabel Louise Riley Foundation
The Robbins-de Beaumont Foundation
Sailors' Snug Harbor of Boston
William E. and Bertha E. Schrafft Charitable Trust
Gardiner Howland Shaw Foundation
The Joanne B. Simches Charitable Foundation
State Street Bank and Trust Company
State Street Bank and Trust Company,
Charitable Trusts
Anna B. Stearns Charitable Foundation
Abbot and Dorothy H. Stevens Foundation
Nathaniel and Elizabeth P. Stevens Foundation
The Sudbury Foundation
Svrluga Foundation
TJX Foundation
Trustees of Sears and Other Funds
Tufts Health Plan
UAM Charitable Foundation
Albert O. Wilson Foundation
Wyman-Gordon Foundation