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# Shortcuts to Proposal Writing: Creating a Master Template



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## **Creating a Master Template of Common Proposal Questions**

Proposal writing is a time consuming process. You need to carry out proper research, collect information from various sources, read through the proposal format and fill in the appropriate details. All of these tasks are also required to be undertaken in a short time frame because most proposal submissions have deadlines which you need to follow carefully.

In such a situation, how can you develop a quality proposal? One of the best ways is to pre-identify some of the common questions donor agencies ask from NGOs in their proposal formats. Although proposal formats vary from one donor agency to another, there are still some questions which appear to be common in all these formats. If you prepare yourself in advance for these questions, then you are saving yourself some time for working on the remaining part of the proposal.

A master template would be useful in this regard. You develop a list of the questions that appear in all proposals and write down their answers in a template and call it a master template. When you are required to write a proposal, you only need to copy the information from this master template and paste it in the proposal application form.

For example, many donor agencies ask about the monitoring and evaluation plan for the proposed project. Instead of re-conceptualizing the entire process, you can just copy the plan from the master template that you have developed previously. Of course, some monitoring and evaluation plans can be custom-oriented for different projects, but in small proposal application forms, they remain the same.

So what are the commonly asked questions in proposals for which NGOs can prepare in advance? Here we are discussing them below:

### **1. Introduction to your NGO**

The very first section of any proposal application form would like to know about your organization. It seeks to know the basic details such as the name of the organization, contact information, contact person, objectives and mission, etc.



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This can be the easiest part in a proposal, but instead of repeatedly writing and re-writing the same piece of information in every proposal, you can just copy and paste it from your master template. So the first section of the master template can have the following details:

#### **A. About the Organization**

- Name of the Organization:
- Acronym:
- Contact Address:
- Telephone:
- Fax:
- Email:
- Website:

In the new online era of social networking, it will also be a good idea to mention any social profiles you have online. This can be extremely useful because if a donor agency wants to know more, it can check your details online. Social profiles can be your Facebook Page or your Twitter Account, YouTube videos, blog, LinkedIn or more recently, Google Plus. Of course, many NGOs in developing countries will not have enough Facebook likes or Twitter followers, but if you keep updating them regularly and posting any information about what your organization has been doing, it can give a good impression to the donor agency.

So if you have accounts in various social networking sites, you can mention them in master template or in proposals.

A complete profile of the organization including social profiles can be set up as follows:



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## **A. About the Organization**

- Name of the Organization:
- Acronym:
- Contact Address:
- Telephone:
- Fax:
- Email:
- Website:
- Skype ID:
- Facebook Page:
- Twitter:
- YouTube:
- LinkedIn:
- Google Plus:

## **2. The Objectives and Mission of the NGO**

In order to know more about the organization, many donors want to know about the objectives, mission or goal of the NGO in the proposals. So it is better to list them out in the master template instead of typing them again and again in different proposal application forms. The organization's mission or goal can be a very important for donors in making a funding decision. You need to have a clear and suitable mission that reflects the idea and work of the organization. If you are a registered NGO, then you already have a mission. You can rephrase this mission anytime to keep it updated to the current work of your organization. But make sure that the project you are applying for is somehow related to your mission. If your mission is about improving the environment and you are submitting a proposal for disability support, then the donor will instantly reject your proposal. Always develop the mission in relation to the project you are proposing.



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Also, a mission should be a broad statement or a general idea for which you are working for. Avoid trying to be very specific in this regard. However, the organization's objectives are very specific.

For example, "to increase awareness of climate change issues among farmers" is an objective. A mission can be: "To educate the community on a range of environmental issues."

You can mention your objectives and mission in the master template so that it is easy to copy it and paste it in any proposal application form.

### **3. Project Background**

What is a project background? The project background provides facts and information for donors to gain a basic understanding of the project site. This basic description of your project area can be similar across various proposals. For example, factors such as healthcare situation, educational background or unemployment rate—which can be generally referenced in the project rationale—are part of the project background and remain the same across various project proposals. It is helpful to write a paragraph on the basic description of the project to use as a reference for different project proposals.

#### **Researching Project Area Background**

Before developing the project background, you need to undertake tremendous research on the basic situation of the project area. You can carry out field research, talk to the community and refer to relevant books and journals about your project area. When you have collected enough data or research material, you can sit down and develop a write-up about the general situation of the project area and its people. Your write-up can give an idea about how people are surviving, how women and children are looked after, their livelihood options, their healthcare situation, their level of accessibility to education, their employment rate, their common socio-economic issues, and the kinds of government or third-party services that are available.

While writing on this, make sure that whatever point you make, there is research-based evidence available for it. For example, if you mention that over 40% of children in the project area are unable to attend primary schooling, you need to give a reference to where you got this information. If it is a government record or a research undertaken previously, make sure you quote it.



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Most donor agencies are interested to know the situation of women and children in any project area because they belong to a very vulnerable group. It will be a good idea to provide some data regarding this issue while developing the project background.

You can build this basic information and keep it in the master template. So whenever a proposal request comes up, you can quickly copy this information into it and develop it with your project rationale for the specific project you are requesting funding for.

#### **4. Project Rationale and Problem Identification**

Any project proposal requires a project rationale to explain to the donor agency the problem that your project will address and the reasons for the problem. This is a very important part of the proposal because here you try to convince the donor agency the necessity of putting its money into the cause. The project rationale identifies the specific problem based on particular background information of the project site; these details can be pulled from your project background master template. The project rationale identifies the important root causes of the problem that you will address. For every project, write a paragraph or two describing your project rationale and keep it in your master template so that it is easy to copy and paste in any proposal application form.

#### **5. Monitoring and Evaluation Plan**

Every donor agency – seeking a proposal from you – will request for a monitoring and evaluation plan. It is important for your NGO to develop this plan because it is the NGO's responsibility to monitor the progress of the project. Simply carrying out meetings between the organizational director and field staff to discuss the project is not enough. You need to have a complete plan for how the projects' results will be achieved and how they will be evaluated.

Any NGO can develop its own monitoring and evaluation plan. Sometimes, board members of NGOs develop the plans to monitor and evaluate the progress of the organization. You can use the same plan and adapt it to the needs of the project. In any case, you need to develop and save this plan in a master template and paste it in any proposal submission form so that you save time from developing it each time you are writing a proposal.



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In a monitoring and evaluation plan, you need to define its objectives first. Generally, such a plan is developed:

- To review progress of the project, including achievements and limitations
- To re-strategize the project, if required

Then, you need to develop the strategy as to how you are going to achieve the objectives. This strategy includes a set of indicators which can be used to review the progress of the project. There can be different kinds of indicators, such as qualitative indicators and quantitative indicators, and results indicators and process indicators. A good monitoring and evaluation plan will have separate indicators and each of these will be reviewed from time to time by the organization.

In the plan, you also need to mention the sources of information for your indicators, in other words, how or from where you are going to collect information for these indicators, The source could be a project report, case study, field staff diaries, community-based assessments, research data etc.

The plan should also mention the number of project meetings and visits you will have the year and the names of those persons involved in monitoring the project. For example, you can conduct quarterly meetings to monitor the project. These quarterly meetings can be conducted by the project staff. There can also be annual meetings along with visits to monitor or evaluate the project. In this case, there can be external consultants, government officials, donor representatives and others involved. Be sure to specify your meetings, visits and project evaluators. Evaluations can be undertaken at mid-term or end-of-term. It is always better to have an external agency to carry out this evaluation to get an objective idea of the progress.

## **6. Creating a Sustainability Plan**

A core question that every donor agency asks in a proposal is: 'What is the Sustainability Plan for the project?' Donor agencies ask this question because all projects have limited time durations and donors want to know what will happen to the all the efforts made by the project staff once the project ends. It is one of the most common questions donors will ask in the proposal, whether the grant is for one year or for several years.



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There can also be different kinds of sustainability: organizational sustainability, financial sustainability and/or community sustainability. Organizational sustainability is how the organization will continue to sustain in absence of the donor support. Financial sustainability is about the financial support required for the project or the organization after the grant has ended. Similarly, community sustainability is how the community in the project site will continue to carry out the project activities when the grant is no longer available.

First of all, while developing the sustainability plan, you need to mention how the community or the primary beneficiaries of the project will be participating in the implementation process. A community is an important project stakeholder and its involvement must be ensured from day one of the project. If you explain community involvement in the plan, you can convince the donor that sustainability is built into the core of the project. The organization should allow the community to understand that the community is the owner of the project; therefore, the community must continue implementing it even after the support has been withdrawn.

The next part of the plan is to guarantee financial sustainability. In simple terms, where will the money for activities come from when the grant support ends? For this, you can refer back to your project strategy where you have specifically mentioned building community-based mechanisms (such as a cooperative or a community association) and that the project costs would be covered from member contributions. These community based mechanisms are important elements of project sustainability. In some cases, the donor also wants to know how the organization will sustain itself after the grant. Here you can mention that the organization has its own fundraising skills which will be applied continually to raise funds from other funding agencies.

## **5. Integrating Crosscutting Themes**

Integrating crosscutting themes is another common area found in many proposal application forms. Donor agencies often require NGOs to submit information describing how the organization will integrate specific themes into their projects. This is a mandatory requirement and all applicants should be prepared to address crosscutting themes.



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So what are these crosscutting themes? These themes vary from one donor to another. Common crosscutting themes that donors want to be integrated into projects are gender, environment, governance and sometimes, even HIV/AIDS. Even if your project is about providing better water facilities for the community, you need to integrate the crosscutting themes into your proposal.

Donors ask for these crosscutting themes in their proposal because they want to see that the NGO is implementing a project that is inclusive, effective and impactful. For example, a project in which an NGO distributes solar-powered lights must ensure that women are benefited equally through the activities. In this case, you are integrating the crosscutting theme of gender into your project. Similarly, any project you are implementing should benefit or maintain the environment. For this reason, you need to include environment as a crosscutting theme.

When writing about the crosscutting themes, mention how you are integrating them into your project and how the beneficiaries will be affected by it. Any product or service you offer to the community should be equally accessed by both women and men. It is also important that any leadership process introduced to the community has both women and men involved in taking the lead.

For a crosscutting theme such as environment, you can include an environment policy and/or mention that you are educating your staff and the community to ensure that there is minimum impact over the environment from your intervention.

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