Guide to Successful Project or Proposal Planning:  
Asking a Company or a Philanthropic Foundation for Support  
July 2008

Crafting a quality proposal to advance education, address a societal problem, and/or build economic prosperity is key to securing private funds. The following guide outlines the information to frame your opportunity. We encourage you not to complete this information prior to calling us, but recognize the aspects and thought behind successful philanthropy. Corporate and Foundation Relations will assist throughout the process – strategy, research, solicitation, and communication.

1) **Background on the Requester/Applicant**
- Who is applying for funding
- VTF purpose & goals
- VT programs and activities
- VT clients or constituents
- VT previous accomplishments
- Applicant’s qualifications
- Repeat for collaborative entities
- Documents of collaborative efforts / agreements between applicants and collaborative entities
- Statements of support from collaborative entities

2) **Background on the Corporation or Foundation**
- Motivation – What are the most important things we need to know about this prospect?
- Why are they interested in awarding this gift for this purpose?
- What was their experience with VT (e.g. recruiting, previous donations, research sponsor, etc.)?
- What is their continuing involvement with VT?
- What values shape their philanthropy?
- What issues / causes are important to them?
- What are their other philanthropic interests?
- How do they want to give?

3) **Problem Statements of Needs Assessment**
- Simple, concise statement of issue(s) the program will address
- State in terms of client’s needs and problems
- Verifiable — supported by evidence, statement of authorities
- Does not rely on “lack of the requested program” argument
- Persuasive and “sets-up” program goals and objectives
- Why this program is the “answer”

4) **Program Description**
- Explain program — concrete examples
- Why the program is important/needed, different from problem solving and enables the program to be justified on its own merits
- How will program help donor achieve its goals & objectives
5) **Program Goals/Mission**
- Respond to problem/need
- Long-range benefits
- What is Not measurable

6) **Program Objectives**
- At least one objective per problem/need
- Objectives have measurable outcomes
- Describe clients/population that will benefit
- Impact -- Who or what will the gift benefit
- What will the donor create at VT with this gift
- How will the gift benefit students, faculty, or the university
- Timetable for objectives

7) **Methods**
- Describes program activities (covering each objective)
- Why activities are chosen
- State sequence of activities
- Activities should yield desired objectives
- Describe staffing
- Describe clients and client selection process
- Timeline for activities

8) **Evaluation**
- Plan for evaluating accomplishments
- Plan to evaluate and modify methods/objectives during course of program
- How data gathered
- How data analyzed
- Who will perform evaluation and how they are chosen
- Criteria for success
- Describe evaluation reports, frequency, and scope

9) **Future Funding**
- Plan to fund program if continued
- How will maintenance and future program costs be covered

10) **Budget**
- Total program cost
- Total fund-raising goal
- Specific amount request from funding organization
- Other sources for additional amount to be raised
- Detailed line-item budget over timeline
- Proposal narrative and line-item budget - covers goals, objectives, and methods
- Includes all funding sources: VT in-kind, other funding sources, volunteers, etc.
- Includes all costs: consultants, all salaries/benefits, building materials, equipment, and other non-personnel costs
- What realistically will fund program

11) **Close**
- Restate ask and summarize justification