

Proposal Development Guidelines

Proposal page limit: No more than 7 pages with the ability to add any necessary appendices.

Summary page: *will replace the Letter of Request and include:*

- Name of Requesting Organization,
- Fiscal Sponsor (Y or N), If Y, Name of Sponsored Project
- Project Name
- Amount Requested
- Term Requested
- Primary Contact
- Legal Signatory and their signature.

Organizational Profile: Explain how this project aligns with your organization's mission and strategy, and why your organization (and other collaborating partners, if applicable) are well positioned to deliver it.

Problem Statement: Provide a concise, word-limited description of the primary issue your project will address.

Project Approach: Summarize your proposed solution and explain why you believe it will work in this specific context.

Grant Activities: Describe the core activities your organization will carry out with RF support. Note any other funders supporting this work. Activities should be clearly defined and aligned with charitable purposes.

All grantees will also need to answer the following:

Will grant activities include advocacy? If Yes:

- Please describe this work and discuss who the advocacy will be directed and the ultimate beneficiaries of the advocacy.
- RF is unable to support lobbying activities as defined by the IRS. *[Insert link to lobbying guidance]* As such, please describe how your organization will ensure the work will conform to these lobbying restrictions. Does your organization have legal counsel to ensure compliance with IRS regulations?

Project Beneficiaries: Describe who will benefit from this work, both directly and over time. Indicate whether the project is intended to benefit specific vulnerable or marginalized groups.

Risk Management: Please provide responses to the following questions:

- What are 2-3 most concerning risks to the project (financial, political, governance, etc.) and how will your organization manage them?
- If this request is part of a larger funding effort, what will happen if other funding does not come through?
- If this is a longer-term project, how will it be sustained after RF's funding has ended?

Outputs/Work Products: What materials and outputs will be generated in the course of the work?

- Please indicate if any of the work products will be made publicly available and detail how they will be shared and which will be delivered to RF

Projected Outcomes and Impacts: Please describe the outcomes and/or impacts that this project aims to bring about over the short, medium, and longer term. To the extent possible, be clear about the desired change(s) and for whom.

Impact Monitoring, Evaluation and Learning (MEL):

- **Impact Monitoring:** Based on the Outcomes and Impacts identified above, please develop a short list of key Indicators (qualitative and quantitative) that are meaningful and feasible to track and report on throughout the lifecycle of this grant. Include details on indicator definitions, units, frequency of data collection and reporting, and data sources.
- Where applicable, please Identify which of the following OneRF Indicators might be relevant to this project and feasible for you to track and periodically report on.

PEOPLE

- **Enablers:** # people engaged by RF grantees or partners to spur downstream impacts for end-users/targeted beneficiaries.
- **End Users:** # people from target beneficiary communities accessing or using a product or service.

- **Impacted:** # people experiencing a clear, measurable outcome or impact from an intervention.

PLANET

- **Land:** # hectares covered by water, land and/or biodiversity conservation, protection and/or restoration*
- **Greenhouse Gasses:** # t/CO₂e avoided, reduced or sequestered

CAPITAL MOBILIZATION

- **Direct Mobilization:** \$ into RF-created or RF-supported organizations, funds or solution.
- **Indirect Mobilization:** \$ into a concept or model that RF piloted, demonstrated, and/or helped to scale.

Evaluation: Will Independent evaluation be undertaken as part of this project? If so, what is the anticipated scope and timing of evaluation activities?

Learning: Is there a learning agenda associated with this project? If so, what are some learning questions that will be explored and reflected on throughout the course of this project?

Please describe your organization's capacity to carry out MEL plan (i.e., staffing, resourcing, partnerships, data systems, etc.).

- If there are no MEL activities planned for this grant, please note in your proposal, along with brief rationale.

Annex: Key Lead Bios: *(to be included as an appendix to the proposal and will not impact word count limit):* Please provide brief bios on key personnel working on this grant project.

***NOTE:** The Budget narrative will be in the actual budget. This will ensure better alignment.*

Required Grant Package Documents

Required Grant Package Documents:

1. Proposal
2. Budget
3. Fiscal Sponsorship Agreement (if applicable)

DD Materials Submitted by Grantee

4. Audited/Unaudited Financials (if applicable)
5. Cyber Security Questionnaire (If applicable)
6. Pre Grant Questionnaire, [Future state: if existing grantee, grantee will review previous responses and affirm accuracy. Future state: grant-specific contacts will be a separate required form-field in the grantee portal.]

DD Materials Submitted by Responsible Officer/OGM

7. Guidestar charity check and 990 (when 501c3)
8. GRRA (current state: Xapient report.)
9. Equivalency Determination (initiated and uploaded by OGM)
10. Time Tracking policy (ER Grantees Only)
11. Travel and Expense policy (ER Grantees Only)
12. Incorporation documents (ER Grantees Only)

**Review your grantee account record before asking for documentation.*

- *If a returning grantee was rated low risk in the past 3 years, then audited financials are not needed.*
- *If a returning grantee is an ER grantee, the governing documents, and policies are not needed again, as they were collected the first time funding was awarded.*