
Factsheet:

Writing a proposal

SCOTTISH
MUSEUMS
COUNCIL



Writing a proposal is probably the most useful skill fundraiser's repertoire. The fundraising proposal communicates the needs of the organisation to its potential supporters. Many funders will decide whether or not to make a grant or indeed whether to continue to read the application on the basis of the first few lines of the covering letter.

This factsheet does not provide a blueprint for success but aims to identify the key points which will enable you to produce a proposal which matches the requirements of a potential funder. The same basic approach applies when approaching most sources of funding, whether a local authority, a trust or a company. Lottery fundraising is quite different - a separate fact sheet is available - however this technique is invaluable for raising the matching funding you will require.

It is worth mentioning at this point that, if a funder sends you an application form, you should use it. If they say they want information in a certain way, give them it in that form. Because charitable trusts and companies get so many applications, some have specified particular information they wish to assess - your application will go straight in the bin if you have not used a pre-specified format if one is requested. That being said, this is not the case for most funders. There is, however, general agreement on a proposal model that constitutes a good structure in these circumstances.

Covering letter

Make sure the letter is short - a maximum of 4-5 paragraphs - and is kept clear and concise. Explain, in brief, how you can resolve the problem, demonstrate your credibility by outlining past achievements and current viability. Your first paragraph is crucial and should contain a sentence on each of the following points

- who exactly is applying for funds
- the issue or problem to be tackled
- how you mean to do this
- how much the proposal will cost, how much you have committed from other sources, and financial and human resources of your own.

The rest of the covering letter should expand on this, giving key points. Your concluding paragraph should outline why you believe the funder you are approaching should support your project. Relate your application to their policies for giving and their areas of interest. If you have charitable status, your stationery must state this.

Introduction

This section provides you with the opportunity to lay out some of the background to your work.

An introduction should contain

- your opening line which answers the following questions - who you are, what you are, where you operate, when you were established, and why you do what you do
- an indication of your achievements or track record
- a brief outline of your more general activities
- an outline of how you are currently supported.

The key issue in the introduction is to establish your credibility and the need for the project.

Problem statement

What is the problem that you wish to solve and why is it important? This is your framework for action. You have to make it clear that you are undertaking the proposed project because there is a real need for it. The problem statement should have a logical connection to the overall aims of your organisation.

Aims in describing your problem

- the problem should focus on people - not your museum and not your collections - focus on the end user and the outcome of your project
- the problem should be demand-driven and not supply-led, i.e. the public wants it
- the problem should be concrete not abstract, i.e. you should be able to prove the public demand for the outcome of your project
- the problem should outline the negative effects of not being able to carry out the project
- emphasising urgency when something is not in fact urgent only serves to annoy potential funders [if you explain the project's **priority** within your forward planning then, when you do have a real emergency (e.g. flood, collapsed roof etc), your funders will treat emergency requests as such]
- the problem should be solvable.

Programme and methods

You have summarised the nature of the task you are going to tackle. Now you need to say what you intend to do about the problem and also show why you are the best organisation to undertake this work. You should try to set yourself specific objectives for what you propose to do. An objective is a specific, measurable outcome of your project. Most funders judge applications on the impact or outcome of the work and the value-for-money relationship.

You will then have to detail the methods you will use to achieve these objectives. Use layman's terms and write in plain English. You cannot expect the funder to have detailed knowledge of your museum, your project or even museum practices in general.

Evaluation

Charitable Trusts and companies with charitable budgets must give this money away to charities. This is the law that enabled them to reap the tax benefits of setting up a charitable trust - do not get too caught up in philanthropic values as this only relates to their chosen field for charitable giving. As fundraising proposals request the potential funder to invest their money in your project, you must demonstrate that you are reliable and that this will be a good investment. Evaluation is an essential feature of a good proposal. It shows that you are serious about your work and that you will spend any money you raise wisely. You must set measurable objectives for the project, measure the results you achieve and report these to the donor.

By evaluating your work, you not only demonstrate how effective you are, but also such evaluation provides you with a tool to make appropriate adjustments to the project as the work proceeds.

Budget

A good budget contains the following elements

- a clear statement of all the money you need and what you need it for
- a clear statement of who else has definitely committed to giving you money and how much
- accounts that add up (yes, the most common failing of a budget is that it does not add up!)
- allowance for depreciation, inflation, salary increases, etc if covering more than one year.

Future funding

Funders are always concerned to know what will happen at the end of their committed contribution. If you do plan to go back to the same funder, say so when you report to them as to how you have spent their money this year. If not, and the scheme is to continue, outline how you plan to carry on funding the scheme beyond this period.

The request: how much to ask for

Remember, fundraising is about making a good case. If you are able to make a good case and the project is accepted by the funder, the only question is how much to give. It is always helpful to make a specific request rather than ask the funder to decide what level of support is appropriate. You will of course, in your research, have ascertained the range of grant which the funder is likely to give.

You may decide to ask for a one-off grant or a grant spread over several years. Again, your research should show which is the most likely. If you decide to request a grant for just the current year, you should still approach the funder every year. As long as you report back on how you have spent their money

and they are satisfied that it is well invested, they should be happy to keep funding you for a few years. If you are approaching a new funder, it is wise not to ask for a multi-annual donation in the first place. Try a one-off grant so that they can test the water with you before entering a long-term funding partnership.

Supporting information

A good application is short and succinct - it should not be more than two pages long. You may also include photographs but do not expect these to be returned. Most funders will receive more applications than they can cope with in terms of processing. You will make their job easier if you are brief and to the point. Attach a promotional leaflet and your most recent set of accounts but further information is not normally required and, if it is, the funder will ask for it.

This is one of a number of related factsheets written for SMC's member museums covering aspects of fundraising.

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A company limited by guarantee No. 74264, recognised as a charity No. SCO 15593

March 2006