



Wells Mountain Initiative

Community Development Growth Grant

Written Proposal Guidelines

All applicants are required to prepare an official written proposal. This proposal should include the following sections. Use these guidelines to help prepare a strong written proposal. If you have any questions about the content to include in your written proposal, write to bonnymark@wellsmountaininitiative.org.

Proposal Sections	Elements to Include
<p><u>Section 1: Title Page & Abstract</u></p> <p>This page should provide an overview of key proposal information. Consider providing abstract information in bullet form. Keep it short and simple.</p>	<p>Include:</p> <ul style="list-style-type: none">o Proposal titleo Applicant's full nameo Applicant's countryo Location of initiativeo Short paragraph stating what will be implemented and achieved with the growth grant award.o Total cost to implement the proposal in local currency and USDo Grant amount requested in local currency and USDo Date of Submission: MM/DD/YYYY
<p><u>Section 2: Historical Overview</u></p> <p>Use this as an opportunity to introduce your existing business, organization, or on-going community project. Keep responses short and answer all questions asked.</p>	<p>Document the following:</p> <ul style="list-style-type: none">o Short summary including:<ul style="list-style-type: none">o Who do you serve?o What services or programs do you provide?o Where are these services or programs implemented?o Where are you located?o Why is your business or program needed?o How was the WMI Seed Grant successfully used?



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	<ul style="list-style-type: none">o Create a bullet list of successes achieved through the WMI Seed Grant award:<ul style="list-style-type: none">o Number of beneficiaries servedo Financial statistics<ul style="list-style-type: none">▪ Annual Revenue Growth▪ Growth in Gross & Net profit (for businesses)▪ Improvement in financial systemso Successful partnershipso Service and program expansiono List <u>current</u> staff/volunteers, their titles, if they work part-time or full-time, and indicate if they are paid or unpaid.o Provide links to any online presences (website, Facebook page, LinkedIn page, etc.).
<p><u>Section 3: Needs Statement & Assessment for Growth/Expansion</u></p> <p>The needs statement clearly describes the problem/issue and includes the areas that you will address. This should include data related to beneficiaries/customers.</p>	<p>Include response to the following:</p> <ul style="list-style-type: none">o Define the issue you are hoping to address/market needs you are planning to fill.o Why is your organization or business needed?o Provide evidence to support the need for your organization. <p>Evidence could include forms of:</p> <ul style="list-style-type: none">o Demographic datao Statistics from reputable sourceso Testimonials from experts or professionals within the area(s) of needo Surveys and resultso Observational datao Experiential statementso Financial data and projections



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Section 4: SMART Goals and Objectives

Consider the needs identified and create SMART goals and objectives related to the growth/expansion of your existing initiative.

Think strategically about the following:

- o Goals are statements of the outcome you are trying to accomplish
- o Objectives are defined statements related to actions that you will take to work towards achieving your goals
- o Use the SMART Goals & Objectives handout to guide you with creating goals and objectives

Handout:

https://bit.ly/2024_CDG_Growth_SMART-Goal-and-Objectives

Section 5: SWOT Analysis

Evaluate your proposal with the SWOT analysis strategic planning technique. Identify strengths, weaknesses, opportunities, and threats related to business competition/project planning and implementation.

Review the SWOT analysis handout and utilize this strategy to write about each of the following related to your expansion/growth plan:

- o Strengths (Internal)
- o Weaknesses (Internal)
- o Opportunities (External)
- o Threats (External)

The SWOT analysis should be conducted on your existing business, organisation, or on-going community project.

Handout: https://bit.ly/2024_CDG_Growth_SWOT-Analysis

Section 6: Risk Assessment

Identify potential risks that could negatively impact the ability to conduct business or successfully implement programs. A risk assessment helps to identify inherent challenges and provide measures, processes and controls to reduce or eliminate the impact of these risks to operations.

Create a Risk Management Matrix and document 3-5 risks relevant to the implementation of your growth proposal:

Brainstorm risks and analyzing each risk with the following questions: 1. Likelihood: How likely is the risk to occur? 2. Impact: Consider if this risk happens, how will this impact your business?

Risk Management Matrix



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Likelihood	Score	Impact	Score
Very likely	3	Stop operations	3
Moderate likelihood	2	Operate on a reduced capacity	2
Not very likely	1	Not very affected	1

Plan what to do with risks: Design a risk management matrix analysis for 3-5 possible risks.

Risk (Identify the risk)	Likelihood Score	Impact Score	Action to mitigate or reduce risk	Who will be responsible

Section 7: Growth/Expansion Plan & Activities

Explain the purchases, procedures, processes, development of training materials, expansion of staff, activities, or events that will take place. Connect the growth/expansion plan and activities to your goals and objectives in section 4.

What do you plan to do:

- o Provide a narrative of your growth/expansion plan
- o List each activity/purchase/element to be implemented and detail what will happen (where, when, who will assist, and how activities relate to meeting goals and objectives) to aid in the growth/expansion of your existing initiative.

Section 8: Human Resources

As your initiative expands, forecast how staffing needs will change. Consider what roles and time

Detail:

Current:



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commitments will be necessary to ensure successful expansion and who will be able to fill these needs. Budgetary line items should reflect what you include within this section. Each position that is paid or receives a stipend, must be included on the budget as an individual expense line item.

- o List current staff/volunteers in 2023, their titles, the frequency they work (event-based, part-time or full-time), their compensation (stipends, salaried, unpaid)

Proposed:

- o List projected staff/volunteers in 2023, their titles, the frequency they will work (event-based, part-time or full-time), their compensation (stipends, salaried, unpaid)

Section 9: Finances & Financial Management

Providing accurate and clear data related to your initiative's finances is a very important aspect of the application process. All past and current financial data should be documented and financial projections should be realistic. Review the Required Supporting Documents Section for more information.

Provide details about:

Current:

- o Describe your current financial management systems and person responsible.
- o Provide financial statements for the last two years, that must include:
 - o Total Revenue
 - o Total Expenses
 - o Year-end
- o List from 2022 - present: What were the revenue sources
- o As of August 1, 2023: What is the current available balance for on-going activities in the local currency

Proposed:

- o What financial management improvements will be made?
- o Describe how finances will be managed and by whom
- o How will funds be generated
- o In 2024: What are the projected revenue sources



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	<ul style="list-style-type: none">o As of December 31, 2022: What is the projected available balance for on-going activities in the local currency
<p><u>Section 10: Partnerships & Assistance</u></p> <p>What local, state, regional, national, or international resources are available to support your proposal. Consider knowledge contributions/mentorship, funding, resources, volunteers, in-kind donations, etc. Research and identify individuals and organizations (both for-profit and nonprofit) that would be interested in your proposal.</p>	<p>List:</p> <p>Create a current list of partnerships your initiative has developed:</p> <ul style="list-style-type: none">o Name of the person, group, organization, or businesso Partnership/assistance provided (amounts/frequency)o Is there potential for continued or expanded partnership? <p>Create a proposed list of continued/new partnerships your initiative can develop:</p> <ul style="list-style-type: none">o Name of the person, group, organization, or businesso Partnership/assistance provided (amounts/frequency)o The likelihood of securing their partnership/receiving support: Confirmed, 75% likelihood, 50% likelihood, 25% likelihood, Unlikely, Competitive application process
<p><u>Section 11: Sustainability</u></p> <p>Consider the larger impact of your proposal and ways in which you can continue providing opportunities to learn, engage, train, to provide services, or expand your business.</p>	<p>Discuss:</p> <ul style="list-style-type: none">o How will this grant help you build structures to increase sustainability?o How will the existing initiative continue to operate once the growth grant funding has been spent?o Provide specifics and financial projections
<p><u>Section 12: Measurement & Evaluation</u></p>	<p>Develop:</p>



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Define ways in which you can measure the success of your organisation or business (specific levels of knowledge, attendance, improvement in health conditions, profits, increase of clients, etc.) before implementing your proposal and after. Your goal is to collect data to showcase that the grant helped you to increase the impact of your organisation and/or the net profit of your business.

- o Create a list of 5-10 M&E indicators and include the frequency in which they should be measured (monthly, every three-months, etc.). The indicators developed for the seed grant may apply.
- o Is a pre-and post-knowledge survey relevant for your proposal?
- o Does your business currently solicit feedback and ideas from customers?



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Community Development Growth Grant Required Supporting Documents & Templates

Supporting Document 1: Planning Timeline*

Define what steps will need to take place in order to implement the proposal. Detail the action steps on the Planning Timeline template.

On the template include:

- o Project stage
- o Short description of the task
- o Responsible person
- o Date the task will be started
- o Date the task should be completed
- o Result of the completed task

Template:

<https://bit.ly/2024-CDG-Growth-Planning-Timeline-Template>

Supporting Document 2: Budget(s)*

All applicants will complete the Budget Proposal. On this excel sheet template you will list and itemize all anticipated funding sources (revenue) and all anticipated costs (expenses).

Proposals that will be implemented over the course of more than one month are required to also complete a Monthly Expense & Revenue Breakdown Budget.

If your proposal is for a program that will run for three months, you will create a budget for these three months.

Use the template for the following:

Use your local currency to create both budgets.

Budget Proposal: Consider all expenses that the proposal could incur. Itemize these expenses. List funds available and expected funds from other sources to support the initiative. This will require on the ground work to build support and investment for your proposal.

Monthly Expense & Revenue Breakdown Budget: Use this template to determine what expenses you will incur and when. Additionally, list when you will receive funding support or estimate incoming monthly revenue.

Template:

<https://bit.ly/2024-CDG-Growth-Budget-Template>



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<p>If your proposal is for on-going activities, please complete a 12-month budget.</p>	
<p><u>Supporting Document 3: Financial Records - Fiscal Year of 2022*</u></p>	<p>Provide complete fiscal records for the year of 2022. The review committee will use this information to understand the fiscal health of your initiative.</p>
<p><u>Supporting Document 4: Financial Records - Fiscal Year of 2023</u></p>	<p>Provide complete fiscal records for the year of 2023. The review committee will use this information to understand the fiscal health of your initiative.</p>
<p><u>Supporting Document 5: Financial Records - January 2024 - August 2024</u></p>	<p>Provide financial records from January - August 2024. The review committee will use this information to understand the fiscal health of your initiative</p>
<p><u>Suggested Optional Supporting Documents</u></p>	<p>If you would like to include additional supporting documents, you will have the ability to upload them within the application form. Suggested optional supporting documents include:</p> <ul style="list-style-type: none">➤ Registration certificates➤ Trading licence/operational permit➤ List of leaders/employees and their roles➤ List of board members➤ Partnership agreement letters➤ Financial audit report➤ Tax clearance certificate➤ Permission/community approval letter➤ Annual reports➤ Branding guide/logo