# **WALTER & ELISE HAAS FUND** Sample General Operating Support Proposal

**ABOUT THIS SAMPLE**

We understand grantseekers need to use many different online portals hosted by many different grantmakers. To help connect the Fund’s requirements to your process, we offer this sample general operating support proposal for you to use when preparing a proposal for us.

Review below to see what you’ll be asked for in our [online grantseeker portal](https://haassr.fluxx.io). You can put your answers in this document, sharing with colleagues as you see fit. When you’re ready, [log in](https://haassr.fluxx.io/) to cut and paste where appropriate.

Please note that

* Some parts of the general operating support proposal allow you to **pick from a list** of prepared options or **click to upload** instead of cutting and pasting.
* Cutting and pasting from Word may result in unexpected characters in the online application. Check your work!

Questions about this sample or suggestions for improvement? Please email us at [grantsmanager@haassr.org](mailto:grantsmanager@haassr.org?subject=Suggestions%20for%20Sample%20Letter%20of%20Inquiry).

Thank you!

**APPLICANT ORGANIZATION DETAILS**

* **PICK LIST**  
  Are you using a fiscal sponsor?  
  *If you answer yes, you’ll be provided with a field to provide the name of your sponsor*
* Organization Name
* Organization Location
* Primary Contact Name
* Primary Signatory Name
* Primary Financial Officer Name
* **PICK LIST**  
  Need to add contacts?  
  *If you answer yes, you’ll be provided with a blank field to provide name, title, email address and telephone*
* **CLICK TO UPLOAD**  
  Please upload your current organizational board roster. Be sure it includes board member affiliations, and notes board officers.
* **ARTS ORGANIZATIONS ONLY PICK LIST**Does your organization have a current DataArts Profile?  
  *If your organization identifies as an arts organization and you answer yes, you’ll receive instructions for submitted your DataArts profile to us.*

**KEY REQUEST INFORMATION**

* Request Title
* Please provide a one-paragraph summary of what general operating funds will support   
  *(up to 200 characters)*
* Amount Requested
* Overall Project Amount
* Total Organizational Budget
* Requested grant duration (in months)

**THE BASICS**

* **About your Organization**  
  Please provide a brief description of your organization and its key programs.
* **Effect of COVID-19**  
  What has been the impact of COVID-19 on your organization and its work so far, and what do you expect the impact to be moving forward?
* **Goals and Objectives**What do you hope to achieve during the grant period? The Fund is interested in both your big-picture goals and the specific results you anticipate.

*Your statement of objectives clarifies what you want to accomplish with the grant funds and how W&EHF could contribute to your organization’s success. As you write each objective, keep in mind that you will report against the specific statements you make now by presenting an update on how you fared toward achieving each one. Here at the Fund, we will use your stated objectives to track your progress toward meeting the grant’s goals, spark conversation, learn from your work, and determine the overall success of the grant.*

**INSTRUCTIONS**

*Please provide three to five brief statements of what you will accomplish during the term of the grant. The objectives should include:*

* + *Deliverable results (e.g., numbers served, qualitative changes to a program, or publication of briefs or reports); and*
  + *Outcomes (e.g., changes in the status or performance of those who are served, improvements in organizational capacity, or successful implementation of a public policy).*

When possible, identify the target audience or the specific community being served (if applicable). The examples below provide guidance on types of objective statements. Some may be relevant to your grant request. You may also create your own statements.

* **Population Served**
  + Total Number Served Annually
  + Who will benefit from this work?  
    *Please provide any information that helps us understand who your organization serves.*
  + Optionally, describe beneficiaries using these categories:  
    *(If you do not collect this information, you are under no obligation to report it here.)*
    - By Location
    - By Age and Gender
    - By Ethnic and Racial Group
    - By Social and Economic Status
    - By Sexual Identity
    - By Work Status and Occupations
    - By Faith Affiliations

**THE DETAILS**

* **Organizational & Programmatic Priorities**  
  What are your organizational and programmatic priorities for the grant period and why? Please list major activities and a general timeline.
* **Key Personnel**  
  Describe the roles and qualifications of key personnel.
* **Assessment, Evaluation, and Learning**Briefly describe the organization's evaluation plan. What are you collecting to assess your organization's work?

**FINANCES AND FUNDING STRATEGIES**

* **Finances**Please provide an overview of the organization's current financial situation, including major sources of support for the organization and campaign pledges and whether or not this funding is pending or committed.
* **Funding Strategy**  
  Discuss the organizational funding strategy and plans for sustaining the work.

**FINANCIAL DOCUMENTS**

* **CLICK TO UPLOAD**  
  **Current Year Operating Budget**Use your own format, but **you must indicate whether income is pending, committed, or received***.*
* **CLICK TO UPLOAD**  
  **Current Financial Statements**  
  Include both a balance sheet and a profit and loss statement.
* **CLICK TO UPLOAD**  
  **List of Major Funders**  
  Provide names and amounts, and whether funds are pending or committed.
* **CLICK TO UPLOAD**  
  **Year End Financial Statements**  
  Audited, if available. Please provide statements from the most recently completed fiscal year.

**ADDITIONAL CONTEXT**

* Is there anything else you think the Fund should know about your organization’s programs or current challenges?

**AUTHORIZATION TO SUBMIT**

* **PICK LIST**  
  Applicant organization must authorize the submission of the general operating support request to the Walter& Elise Haas Fund.