



New Grant Application Training

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SESSION OBJECTIVES



- Form “A” versus Form “B”
- See “Apply for Funding” at:
www.usadf.gov

DIFFERENT TERMS



Page 5 Question 1 ...

Form A

Who established the organization?

When was it legally registered?

Form B

Who established the enterprise?

When was it legally registered?

DIFFERENT TERMS



Page 5 Question 2 ...

Form A

What is the purpose of the organization?

Form B

What is the purpose of the enterprise?

USADF PROJECT FUNDING APPLICATION

NOTE TO APPLICANT: Funding Proposal should be comprised of three sections and it should address all of the questions listed below, plus any other information that would be useful to USADF in considering your application:

- A. Basic information about your organization
- B. Your current financial situation
- C. The Project Proposal and Budget

Please follow this structure in developing your funding proposal. The narrative to answer the questions below should be **5-8 pages, plus an additional page for the proposed budget.**

A. BASIC INFORMATION ABOUT YOUR ORGANIZATION

- 1) Who established the organization? When was it legally registered?
- 2) What is the purpose of the organization?
- 3) Where do you see the organization headed in the next five years?
- 4) What primary service(s) or product(s) does the organization provide?
- 5) How and where does the organization sell products and / or services?
- 6) How are the benefits of the organization shared among members? For cooperatives and other community-based organizations, how are shares or dividends distributed?
- 7) How does the organization contribute to the welfare of its surrounding community? Does it help the poor, underserved, or marginalized groups in the community?
- 8) Ownership: What is the ownership structure of the organization (names, citizenship, % ownership)?
- 9) Governance: How is the organization directed? If the organization has a Board of Directors, how are they selected and how long do they serve? How often do they meet? List the names of the Directors, their title, citizenship, and their background.
- 10) Membership: Describe the membership structure? What are the criteria for becoming a member and what kind and amount of dues or other payments are required of members?
- 11) Operations: How are day to day operations managed? List the key management roles (name, titles, qualifications and experience). Also, list the senior staff currently employed and their qualifications. Indicate whether they are full-time or part-time.
- 12) Past Achievements: Explain how successful the operations have been over the past three years. Describe the tangible benefits that your members and the local community have received from your operational success?

B. YOUR CURRENT FINANCIAL SITUATION

- 1) List the value and type of major assets owned by the organization (such as money in the bank, credit owed by buyers, members' dues, physical property, etc.).
- 2) List any loans (amounts, term, provider), and other liabilities attached to the organization?

USADF PROJECT FUNDING APPLICATION

- 3) Please list all sources, amounts, and dates of any donor, government or other outside funding received. Have you requested any other funding (grants or loans) support from other donors, NGOs, government, private companies, or banks that are still being considered? If yes, please list details (Name of donor, amount, date of decision).
- 4) Does the enterprise have financial statements for the past two years of operations? Are these audited?
- 5) Does the organization have an accountant or bookkeeper? What are their qualifications?

C. YOUR PROPOSAL FOR FUNDING

- 1) What problems or opportunities does the enterprise face? Why is the project needed?
- 2) What are the goals for the proposed project? What are the expected achievements from such funding? How long will it take to achieve these goals?
- 3) Describe how the enterprise identified the need for this project. Describe who participated in putting together and approving this proposal. How does the community support this project?
- 4) Who will benefit and how from the proposed project? What would be the economic and social impacts on: (a) the business itself, (b) its employees, (c) shareholders, and (d) the surrounding community?
- 5) Briefly describe how to measure the project's success?
- 6) Describe funding allocations, and estimate the amount needed for each. (Attach a proposed budget).
- 7) What will the enterprise contribute to the project (e.g. money, land, labor, existing infrastructure, etc)?
- 8) Will any other groups be involved in providing support (financial or technical) for this project? If so, list the organization and the nature of the support.
- 9) What technical or management help is needed to successfully implement the proposed project?
- 10) Are you willing to repay the amount of USADF funding to a reinvestment trust?

In addition to the narrative funding proposal that must address all of the above questions, you must ATTACH THE FOLLOWING ITEMS to your application.

- 1) Proposed Budget (list each major item, cost, and when needed)
- 2) Copy of your legal registration document.
- 3) Copies of at least the past two years' financial statements (audited statements and management letter, if available).
- 4) Three references that can verify the financial integrity, reliability and usefulness of your enterprise.

SIMILAR INFORMATION CATEGORIES



1. Cover Sheet
2. Organizational Information
3. Financial Status
4. Proposal Details
5. Supporting Documents

MATCH THE GROUP TO THE FORM



FORM A	FORM B
Cooperatives	Small and Medium Sized Enterprises
Community Based	
Intermediary Org	