



Proposal Writing Process

This process outlines the responsibilities of the writer and of the major gift officer/relationship manager so that roles and deadlines are clear before beginning a proposal.

Before Requesting a Proposal:

- Did you clear the amount with Finance and the Philanthropy Leadership Team? (i.e. is there a need for funding in this area?)
- What is the amount?
- How will the amount be invested? (if split, know how the amount will be split among priorities)
- Is this a funding need?
- Does it connect to campaign priorities?
- What is your deadline?
- Will you require graphic/design support from marketing?

Drafting the Proposal:

- Turnaround time on a proposal depends on other pending projects as well as the need and urgency of the request.
- The proposal writer will:
 - collaborate with marketing on design, if necessary;
 - ensure that all messages are consistent, and that appropriate conservation program staff have approved content prior to sending draft to relationship manager;
 - work with finance to prepare a budget for requests, if required; and
 - notify the major gift officer/relationship manager of any possible deadline conflicts that arise to ensure completion by agreed upon date.
- The proposal writer will not contact any donors without seeking the approval of the fundraiser.
- The relationship manager will have an opportunity to review and make edits to the draft.
- Edits will be made within a week's time.

Approval Process:

- The major gift officer/relationship manager:
 - must obtain the approval of the Philanthropy Director for all proposals of \$50,000+;
 - must enter the final proposal and information about the solicitation, including the date the proposal was sent, into the database.
 - will forward final proposal to appropriate staff after submission to let them know it was submitted.

After Funding is Received:

- The major gift officer/relationship manager will:
 - notify the proposal writer, finance and the appropriate conservation program staff member, if necessary.
 - scan grant/gift agreements and any special guidelines and save to the hard drive.
 - notify the proposal writer of upcoming stewardship report deadlines at least two months in advance.