

The CFO's Guide to Winning Funding:

3 Essential Grant Proposal Templates

Modular, Compliant, and Financially Sound.



Presented by



THOMPSON **GRANTS**
a division of CBIS

TEMPLATE 1:

The Restricted Project Grant

Best For: New programs, pilot initiatives, or time-bound projects with a specific start and end date.

1. Cover Letter

Addressed to: [Name of Program Officer], [Title]

The Hook: [Organization Name] respectfully requests a grant of \$[Amount] to support [Project Name]. This initiative aligns directly with [Funder Name]'s priority of [Funder's Goal].

The Ask: This funding will allow us to [Primary Activity] for [Target Population] over the course of [Timeline].



CFO Annotation:

Always mention the specific funding priority you align with. It shows you read their guidelines and aren't just "spraying and praying."

2. Executive Summary

The Problem: [Community Name] is currently facing [Specific Statistic/Problem].

The Solution: Our project, [Project Name], addresses this by [Core Intervention].

The Ask: We are requesting \$[Amount] of the total \$[Total Project Cost] project budget.

3. Statement of Need

The Data: According to [Source Name, Year], [Statistic] of residents in [Location] lack access to [Service].

The Gap: Currently, no other agency provides [Specific Service] to this demographic, leaving a gap of [Number] individuals unserved.

The Local Context: [Insert specific story or local trend that validates the data].

4. Goals & Objectives (SMART)

Goal: Improve [Broad Outcome] for [Target Population].

Objective 1: By [Date], [Organization] will recruit [Number] participants.

Objective 2: By [Date], [Percentage]% of participants will demonstrate [Measurable Skill/Change] as measured by [Assessment Tool].

5. Methods/Program Design

Phase 1 (Planning): [Dates] - Hiring staff, curriculum development, outreach.

Phase 2 (Implementation): [Dates] - Delivery of [Activities/Workshops/Services].

Phase 3 (Wrap-up): [Dates] - Final evaluation and reporting.

Key Personnel: [Name/Title] (FTE: [0.5]) will manage the program.

6. Evaluation Plan

Quantitative: We will track [Metric 1], [Metric 2], and [Metric 3] using [Software/CRM].

Qualitative: We will collect [Number] participant success stories/testimonials.

7. Budget & Budget Narrative

Personnel	[\$Amount] for [Title] ([% of time] dedicated to this project)
Direct Costs	[\$Amount] for [Supplies/Travel/Equipment]
Indirect Costs	[\$Amount] (Calculated at [10% de minimis or NICRA rate])



CFO Annotation:

Ensure your indirect cost rate matches what is allowed in the RFP. If they allow 15% and you ask for 0%, you are leaving money on the table that keeps your lights on.

8. Organizational Background

History: Founded in [Year], [Organization] has served [Number] clients.

Capacity: We manage an annual budget of \$[Amount] and have successfully administered grants from [Funder A] and [Funder B].

TEMPLATE 2:

General Operating Support

Best For: Unrestricted funding, keeping the lights on, salaries, rent, and overall organizational sustainability.

1. Cover Letter

The Ask: [Organization Name] requests an unrestricted grant of \$[Amount] to sustain our mission of [Mission Statement].

The Logic: General operating support allows us to remain agile, maintain essential staff, and focus on long-term impact rather than short-term project cycles.

2. Executive Summary

The Mission: [Organization Name] is the leading provider of [Service] in [Region].

The Track Record: Last year, we achieved [Major Outcome] for [Number] beneficiaries.

The Vision: This funding will support our [Year] Strategic Plan, allowing us to serve [Number] more people.

3. Statement of Need

Systemic Demand: The demand for [Service] has increased by [Percentage]% over the last [Number] years.

Operational Gap: To meet this rising demand without compromising quality, we must sustain our core infrastructure (staff retention, technology, facilities).

4. Goals & Objectives (Organizational)

Strategic Goal 1: Increase total service delivery by [Percentage]%.

Strategic Goal 2: Maintain a staff retention rate of [Percentage]%.

Strategic Goal 3: Diversify revenue streams so that individual giving makes up [Percentage]% of income.

5. Strategic Activities

Core Operations: Continued delivery of [Main Programs].

Capacity Building: Investing in [Technology/Training] to improve efficiency.

Sustainability: Executing our annual fundraising plan to ensure long-term viability.

6. Evaluation Plan

Organizational Health: We measure success through annual financial audits, board engagement, and staff satisfaction surveys.

Mission Impact: We track aggregate data across all programs to ensure we are meeting our mission-level KPIs.

7. Operating Budget & Narrative

Total Expense	[\$Total Annual Budget]
Income	[\$Confirmed Revenue] (Committed) vs. [\$Pending Revenue] (Pending)
The Gap	This grant of [\$Amount] helps close our projected operating gap for the fiscal year



CFO Annotation:

General Operating grants are about the "Gap." Show funders clearly: Expenses minus Committed Revenue equals The Gap (Where their money goes).

8. Organizational Background

Financial Stewardship: We have [Number] months of cash reserves and a clean audit history for [Number] consecutive years.



CFO Annotation:

Mentioning cash reserves proves you are not a sinking ship. Funders want to invest in stability, not bail out emergencies.

TEMPLATE 3:

Letter of Inquiry (LOI)

Best For: Initial contact with foundations, “Pre-Proposals,” and screening steps. This page should look like a formal letterhead.

[Formal Letter Header]

Date: [Date]

To: [Program Officer Name], [Foundation Name]

From: [Executive Director Name], [Organization Name]

Re: Letter of Inquiry: [Project Name]

Paragraph 1: The Hook & The Ask Dear

[Name], I am writing to inquire about a potential partnership between [Organization Name] and [Foundation Name]. We respectfully request \$[Amount] to support [Project Name]. This initiative directly advances your foundation’s goal of [Funder Priority] by [Briefly describe the intervention].

Paragraph 2: The Need & The Solution (Condensed)

In [Location], [Data Point] of [Target Population] are currently struggling with [Problem]. To address this, [Organization Name] has developed a program that [Core Activity]. Unlike other interventions, our approach [Unique Value Proposition/Differentiator]. Over the next [Timeline], we aim to serve [Number] individuals.

Paragraph 3: Impact & Financials

Our primary objective is to [SMART Goal]. The total cost of this project is \$[Total Amount]. We have already secured \$[Amount] from [Other Funder] and are seeking your support to close the funding gap. *

Closing

We welcome the opportunity to submit a full proposal. Thank you for your time and consideration.

Sincerely, [Name] [Title] [Contact Info]



CFO Annotation:

Even in an LOI, mentioning other secured funding creates “Social Proof.” It tells the funder that others have already vetted you and bought in.

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