FULL PROPOSAL FORMAT

Project Title:

Contact Information:

- Name, Job Title
- Organization Name
- Organization Street Address
- Charitable Registration Number
- Telephone #
- Email Address

> Our process for assessing proposals includes having them reviewed by external experts. We ask them to comment on the need for the proposed work, the logic of the proposed project, how likely it is to inform a public policy decision, and the proposed budget. Your proposal should be written in such a way that experts in the field will have sufficient information to be able to critically comment.

Summary

Please reproduce the answers to 1a and 1b you provided in your Letter of Intent, and update them if necessary.

<u>1a) Desired Policy/Practice Change</u>
What change(s) to public policy will the project help create? Please be as specific as you can. As a reminder, our working definition of public policy is:

> Public policy refers to official decisions that guide the activities of governments at the local, municipal, provincial, or federal levels.
>
> For example, public policy decisions can be expressed as legislation, resolutions, regulations, by-laws, appropriations, court decisions, etc.
>
> Public policy refers not only to decisions, but also the programs and administrative practices undertaken by governments.

up to 500 words

1b) Problem Definition

If that change to public policy were to happen, what social and/or environmental problem would be addressed? Who is impacted by the problem, and how? Where possible quantify your answers.

> For example:
>
> 1a) Reduce the speed limit on residential streets by 20%.
>
> 1b) The number of motor vehicle accidents on residential streets would be reduced by 10-15%, significantly reducing risks of physical harm to all residents, reducing damage to property, and reducing cost pressures on automobile insurance.

up to 500 words

Context

Help us better understand the problem you seek to address and the public policy context around it.

1. What has led your organization to focus on this particular social / environmental problem?

2. What public policies are currently in place that respond to this problem? What is known about the effects of these policies? What do we know (or believe) about how they are succeeding and failing? What's wrong that could / should be fixed?

3. To what extent is there a "policy window," and how do we know? (We think of a policy window as an opening in the public policy-making process that creates the possibility for influence over the direction and outcome of that process).

up to 1000 words

Help us better understand your organization.

1. What is your organization's
    - mission/purpose,
    - number of employees
    - annual revenues and expenditures

2. When was the organization founded?

3. Have we worked together in the past? If yes, please identify the year(s) and project(s)

4. Please briefly describe your track record in doing public policy advocacy.

5. Please identify the key strengths of your organization that qualify it to undertake this project.

up to 500 words

(The following two questions may or may not apply)

6. If the project is focused on inquiry or research, please include a short summary of the relevant research literature.

7. If the project is focused on delivering and assessing a pilot or demonstration project, please:
   - include a summary of similar and related projects undertaken in Canada and in other relevant jurisdictions,
   - identify the primary beneficiaries of the project (e.g., 300 school children; 10 seniors; etc.)

up to 1000 words

Project Logic

Help us understand the strategy that will "connect the dots" between the activities you plan to do and the public policy change you seek.

1. Please provide us with either a logic model or a theory of change. It can be as sophisticated as you like, but at a minimum:

   - a logic model should show activities, outputs, outcomes, and impact(s).
   - a theory of change should show both causally-linked outcomes as well as the interventions you plan.

2. In either case, please identify the important assumptions behind your project logic.

3. In either case, please include the public policy change as one of the outcomes.

> There are many online resources available to inform the development of either a logic model or theory of change. We have found the following to be helpful:
>
> https://www.theoryofchange.org/pdf/TOC_fac_guide.pdf
>
> https://wkkf.issuelab.org/resource/logic-model-development-guide.html

Evaluation

Describe how and by whom the proposed project will be evaluated. What evaluation questions will be asked? What indicators will be used? What data will be collected throughout the project to feed into the evaluation process? How and to whom will the evaluation be reported? What decisions will be informed as a result of the evaluation reporting?

Personnel

Identify the names (if possible), roles, and qualifications of the personnel to be involved in the proposed project, whether inside your organization or in a partner organization.

Project Participants

If applicable, name other organizations (including contact persons) who will collaborate on the proposed project.

Work plan

Provide a work plan indicating what activities will take place, when, and by whom. The following format may be useful.

DATE	PERSON(S) RESPONSIBLE	ACTIVITY	OUTPUT/DELIVERABLE
January – March 20XX	Principle Investigator	Develop survey instrument, pre-test instrument, secure permissions required, and administer survey to 500 persons	Published report on survey results
March – April 20XX	…	…	…

Method

Only if inquiry/research is an element of the project plan, describe the methods that will be used (e.g., “participatory action research” or “systematic review of randomized controlled trials,” etc.). Where appropriate, justify the methods you plan to use as compared to alternative methods.

Communications Strategy

Describe how each of the key outputs/deliverables will be communicated. The following format may be useful:

COMMUNICATION OBJECTIVE	SOURCE	CHANNEL	AUDIENCE(S)	MESSAGE	TIMELINE

Example: "To educate the audience about X."	Example: "The executive director of the organization."	Could include: face-to-face meeting, scholarly journal, seminar presentation, web, conference presentation, media release, trade journal, etc.	Example: "Business leaders in the province of XX with a proven record of support for charitable activity."	Summarize the content of the message as well key features of its style.	Indicate when the communica tion will occur.
Objective 2: ...	...	...	...	...	...
Objective 3: ...	...	...	...	...	...

Referees

Please provide the names and **complete** contact information (name, title, mailing address, telephone, and email) for 3 or 4 individuals who have the expertise required to review the content of your proposal. Please do not contact these individuals to request their review; Foundation staff will contact reviewers and manage the external review process. Please note Foundation staff will identify 3-4 additional individuals to review your proposal.

Budget

Using the "sample budget" excel spreadsheet, provide a budget for the entire project, showing where you propose the funds requested from Max Bell Foundation would be allocated. Name the other funding organizations that have been approached, and indicate their status regarding this proposal in terms of "awaiting response," or "committed."

For all personnel, indicate full time equivalents.

The following are Max Bell Foundation's guidelines for budgets and financial reporting. If this project is funded, the budget you propose will be the basis for your financial reporting requirements.

Guidelines for Budgets

Line Item Definitions

Each budget or financial statement should include only those line items which are applicable and necessary. Additional line items may be added for particular projects as approved by the Foundation.

Personnel - Gross salary and benefits related to staff on the proposed/funded project. Include full-time equivalents (FTEs) for all personnel.

Contracts - Payments made to consultants and/or subcontractors who provide services necessary to the project. Include all expenses reimbursed, including salaries, office expenses, travel, etc.

Office Expenses - Expenses directly attributable to the proposed/funded project. Please explain the calculations that lead to this figure.

Travel - Project-related travel expenses, including economy class flights, taxis, hotels, meals, mileage reimbursements, and registration fees.

Communication - All expenses related to the communication of information about, progress on, and results of the proposed/funded project.

Indirect Costs
The Foundation supports only those expenses directly attributable to a particular project. Distribution of directly attributable costs may, in some instances, require proration. This is acceptable providing there is a reasonable justification given for the method of prorating costs.