

# Project Proposal Form

**Purpose:** Every project a non-profit board is asked to approve should connect back to the mission, carry a realistic cost (including in-kind contributions), name its risks, and produce measurable outcomes. This template is designed to force those questions onto a single document, in a consistent order, so that proposals can be compared, decisions can be defended, and the organization's work stays aligned with what it exists to do.

**How to use this form:** The first five sections are completed by the project sponsor before presenting the proposal to the board or appropriate committee. The sixth section is reserved for the board secretary or recording officer and is completed after the proposal is discussed and a decision is made. Keep one signed copy with the official board records and provide a copy to the project sponsor and the relevant committee chair.

## 1. Project Basics and Mission Alignment

Every project should connect back to the organization's mission. If it doesn't, this section will surface that quickly.

|                                     |                                       |
|-------------------------------------|---------------------------------------|
| <b>Project title</b>                | <b>Date submitted</b>                 |
| _____                               | _____                                 |
| <b>Submitted by (name and role)</b> | <b>Sponsoring committee or person</b> |
| _____                               | _____                                 |

**Mission pillar this serves**

List or select the specific mission pillar from your organization's stated mission or strategic plan that this project advances.

\_\_\_\_\_

**How this project advances the mission**

Check all that apply.

- Financial** — revenue, sustainability, reserves
- Constituents** — direct service to those the mission serves
- Community** — broader impact beyond direct constituents
- Philanthropic** — donor cultivation, partnerships, visibility
- Operational capacity** — staff, systems, or infrastructure that enables mission work

**Is this project included in the current strategic plan?**

Yes  Partially  No

If "No" or "Partially," explain why proceeding outside the current strategic plan:

## 2. What and Who

*Force clarity on scope before discussing cost. Specific is better than ambitious.*

### Project description

*What does this project actually do? Goals and approach in two to four sentences.*

### Beneficiary category

*Check the one that best describes who benefits.*

- A specific constituent group the mission serves
- The broader community
- The non-profit itself (general fundraiser)
- A specific program of the non-profit (name the program: \_\_\_\_\_)
- Operational improvement to the non-profit

### Number of people directly reached

*Best estimate. Document your assumptions in the description above.*

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### Anticipated outcomes

*Specific outcomes that can be measured. Not "increased awareness" — numbers, changes, or observable results.*

### How will outcomes be measured?

*What data will be collected, by whom, on what schedule?*

## 3. Timeline

*Many proposals collapse on unrealistic dates. Be honest with the projected schedule.*

**Target start date**

**Target completion date**

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**Key milestones**

| Date | Milestone description |
|------|-----------------------|
|      |                       |
|      |                       |
|      |                       |

**Reporting cadence to the board**

Monthly
  Quarterly
  At each milestone
  At project completion only

## 4. Resources and Cost

*Force the real ask onto the page — both direct costs and the in-kind contributions that make small non-profits work.*

**Direct costs**

|                             |  |
|-----------------------------|--|
| Staff hours                 |  |
| Staff cost (dollar amount)  |  |
| Volunteer hours             |  |
| Volunteer dollar-equivalent |  |
| Materials and supplies      |  |
| Services and contractors    |  |
| Contingency                 |  |
| <b>Total direct cost</b>    |  |

**In-kind contributions**

*In-kind contributions are real value. Tracking them protects the project budget and is often required by funders.*

|   |  |
|---|--|
| Time donated (hours)                              |  |
| Time donated — estimated value                    |  |
| Cash donations earmarked for this project         |  |
| Durable goods donated (description and value)     |  |
| Non-durable goods donated (description and value) |  |
| <b>Total in-kind value</b>                        |  |

**Funding sources**

*Grant, general fund, to be raised, designated giving — be specific about which costs are funded by which source.*

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**Equipment, space, or partnerships needed**


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**Tax-position note:** Consider impacts on your tax-exempt status: unrelated business income (UBIT) if any revenue is generated, donor tax deductibility of in-kind gifts, and 990 reporting implications. Consult your treasurer or a CPA on material projects. This template does not replace tax advice.

**5. Risks and Dependencies**

*Risks named in writing are easier to plan for. Risks left unspoken become surprises later.*

**Financial risk**

Likelihood:  Low  Medium  High  N/A

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**Reputational risk**

Likelihood:  Low  Medium  High  N/A

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**Brand risk**

Likelihood:  Low  Medium  High  N/A

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**Insurance and liability risk**

Likelihood:  Low  Medium  High  N/A

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**Mission risk**

Likelihood:  Low  Medium  High  N/A

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**Operational risk**

Likelihood:  Low  Medium  High  N/A

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**Mitigation plan**

*How will the organization address the risks flagged above?*

**External dependencies**

*What has to happen outside this project for it to succeed?*

## 6. Board Action

*This section is reserved for the board secretary or recording officer. The proposal submitter typically leaves it blank. Completed after the board has presented, discussed, and voted on the proposal.*

### Decision

Approved  Approved with conditions  Deferred  Declined

### Conditions or modifications (if any)

### Decision date

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### Vote result

*For example: unanimous, or 5-2.*

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### Action items and responsible parties

*What needs to happen next, and who owns each item?*