



SWING PHI SWING

SOCIAL FELLOWSHIP, INC.®

WHAT YOU NEED TO KNOW WHEN SUBMITTING A PROPOSAL TO SWING PHI SWING SOCIAL FELLOWSHIP, INC.®

The Proposal

This outline is to be used as a guide for all proposals submitted to the National Office and/or the Board of Directors of Swing Phi Swing Social Fellowship, Inc.®. Its goal is to assist the Sisters of Swing Phi Swing S.F.I and/or other individuals in preparing proposals that are brief, but thorough. It is recommended that proposals be one to two and a half pages in length not to exceed 5 pages. All proposals should be presented in electronic format via email or in a hard copy as requested by the board. *Attach the required proposal supporting docs as appropriate for each program, project, activity or recommendation.

Types of Proposals

There are three types of proposals that Swing Phi Swing S.F.I accepts. They are: Policy, Collaborative and Operational. **Policy proposals** deal with setting Swing Phi Swing S.F. I policy, whether by establishing a new policy or changing an existing one, or suggesting formalized partnerships which may need to be supported contractually. Policy proposals can only be decided upon by the board of directors and/or the director who oversees the area the proposal addresses. **Collaborative Proposals** deal with suggestions to establish temporary or extend agreements for activities in which outside organizations wish to become a collaborator/partner on a unified project or activity with Swing Phi Swing. Participation in a collaborative project allows each organization to bear the responsibility, be it fiscal or otherwise, for their distinct contribution(s), on a unified project or activity. Collaborative proposals can only be decided upon by the board of directors. **Operational proposals** have no effect on policy but rather deal with implementation of procedures. Operational proposals can be decided upon by the Executive Office and/or the office for which the proposal addresses.

The essential components in the proposal are as follows:

- **Background:** Provide a brief background, particularly as it relates to history of why this action is necessary, as well as information on why the proposal is being submitted at this time. Outline the problem/opportunity that is being presented.
 - **Proposal Wording:** Make sure you are saying what you mean and are clear about what you are asking the board to vote on. This would include contract language or "legalese". Be very careful in this wording to ensure that the intent is well captured and understood by those who will read and review the proposal. You may even be asked to formally present the proposal.
 - **Pros/Cons:** Outline the reasons why the proposal is beneficial to Swing and some of the reasons why it might not be beneficial. This should be kept to two short lists of bullet points of about 5 to 10 items. Each bullet point should be no more than a couple sentences in length.
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- **Financial Implications:** Proposals may require a level of financial commitment. Provide a best estimate on how much implementing the proposal would cost, save, and raise for Swing Phi Swing S.F.I.
- **Technical implications:** Proposals may include use of our database, changing or adding fields to our database, etc., storage needs, etc.
- **Conclusion:** A simple summary paragraph tying the entire presentation together and supporting the proposal.



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Swing Phi Swing S.F.I. Policy and Procedures

Policy Title:	Proposal Submission
Submitted By:	
Approved By Board of Directors	Date
Effective:	Date
Revision:	Date

Purpose:

This is a guide for all proposals submitted to the leadership of Swing Phi Swing Social Fellowship, Inc. ®. A proposal should follow the following format. The information requested is essential to the proposal submission, review, and approval process.

Definitions:

Policy proposals deal with setting Swing Phi Swing S.F.I policy, whether by establishing a new policy or changing and existing one, or suggesting formalized partnerships which may need to be supported contractually.

Collaborative Proposals deal with suggestions to establish temporary or extend agreements for activities in which outside organizations wish to become a collaborator/partner on a unified project or activity with Swing Phi Swing.

Operational proposals have no effect on policy but rather deal with implementation of procedures and the day-to-day operations of Swing Phi Swing SFI.

Policy:

All official/ formal proposals must be submitted in electronic format via email or in a hard copy as requested by the board

Responsibilities:

The member or committee submitting the proposal is responsible for ensuring the proposal is delivered to the correct individual/ committee for review. The member or committee is also responsible for ensuring that all parts of the proposal form a filled out all necessary support documentation or research is attached.

Procedures:

Proposal Type: <input type="checkbox"/> Policy <input type="checkbox"/> Collaborative <input type="checkbox"/> Operational	
Proposal Title:	Submitted By:
Name of individual, organization, group, chapter, or committee:	
The Outreach Initiative are you addressing through your service project (if applicable):	
Approved By Board of Directors	Date
Effective	Date
Revision	Date

I. INTRODUCTION

A. Describe the history and mission of your organization, group or committee (if applicable), or your relationship with Swing Phi Swing Social Fellowship, Inc. and your professional background.

II. STATEMENT OF THE PROBLEM OR NEED

A. Describe the problem or need that your proposal project/policy seeks to address. If this is an Operational or Policy proposal explain the practice this will replace and the rationale.

B. State how your proposal project/policy will enhance Swing Phi Swing Social Fellowship, Inc. ® (Pros and Cons); 5-10 Bullet Points

C. Provide a brief narrative of the project's geographic location and the people it serves.

D. Include any data or statistics to support your proposal project/policy.

III. STATEMENT OF SOLUTION

A. List the goals or objectives of your proposal project/policy.

B. Location of service site(s) and the estimated number of people to participate, the service population, and number of individuals served by this activity (if applicable).

C. Include a description of your organization, group or committee's previous experience with other similar projects (if applicable).

D. Must provide must the page, Article number and exact wording for new policy or policy changes (if applicable).

E. Provide a list of names, qualifications and responsibilities of key people who will be supervising or managing the project. List contact information for these people, including email addresses, telephone numbers (if applicable).

IV. FUNDING REQUEST (optional if funds are not required)

A. State the amount of your request and the purpose of the request (in U.S. dollars).

B. Provide the projected cost of the total completed project (if applicable).

C. Is fundraising required? YES NO

If your answer is yes, what is the expected amount for fundraising? _____.

Attach an itemized summary of expenses needed for fundraising annotate any requested funds from the organization on the budget worksheet provided.

D. Include the anticipated project start and completion dates, and the approximate date when the funds will be needed (if applicable).

E. List other sources of funding for this project including funds previously received and funds pledged but not yet received.

V. FINANCIAL INFORMATION

A. Provide a copy of your organization, group or committee's Income and Expense Statement for the current year (year to date) and most recent fiscal year (If applicable).

B. Provide a budget and a budget narrative with fiscal impact implications (if applicable).

VI. EVALUATION AND REPORTING

A. Describe the methods your organization, group or committee's will use to measure the success of the project (If applicable).

B. List the key barriers of success for your project/policy.

C. Provide a plan by which the project/policy could become financially self-sustaining (If applicable).

D. When this project has been completed, what is the main source of income that will sustain this project (If applicable)?

VII. REQUIRED SUPPORTING DOCUMENTS

One (1) copy each of the following documents must be submitted with the proposal application:

1. Operational or policy proposals must include the language to be included with the new policy. If there is an existing policy recommended for change, the current policy and the exact wording for the new policy being introduced must be included, along with the location of the existing policy.
2. Letter from the Internal Revenue Service approving your organization's tax status (ect. 501(c) (3)), **or** a copy of your organization's listing in the current edition of the Cumulative List of Charities Published by the U.S. Department of the Treasury (if applicable).
3. Letter(s) of Recommendation or Support: All letters of recommendation or support must be from individuals or organizations that are familiar with your organization, group, committee and the project. Letters from organizations should be on their letterhead (if applicable).
4. The names and affiliations of the members in your organization, group or committee (if applicable).
5. List of key individuals or project affiliates with their qualifications.
6. Your organization's website (if applicable).

Statement of Conclusion (no more than a paragraph)

VIII. ADDITIONAL INFORMATION (optional)

A. Newspaper articles, newsletters, photographs and videos that support your project's need/mission.

Attachments:

Related Forms- Budget Form



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BUDGET WORKSHEET

<i>ADMINISTRATIVE EXPENDITURES</i>		
BUDGET LINE DESCRIPTION* these are only examples of expenditures	DETAILED EXPLANATION	TOTAL
COMMUNICATIONS		\$
DUES/MEMBERSHIPS		
FOOD		
EQUIPMENT		
PROFESSIONAL FEES		
SUPPLIES		
TRAVEL		
TRAINING		
LEASING or SPACE RENTAL		
OTHER SERVICES		
<i>TOTAL ADMINISTRATIVE EXPENDITURES</i>		
<i>Indirect costs-</i>		
In-kind		
<i>TOTAL INDIRECT COSTS</i>		
<i>GRAND TOTAL</i>		
<i>PROGRAM/PROJECT COST</i>		

BUDGET NARRATIVE:

FOR STAFF USE ONLY*to be completed by Swing Phi Swing Social Fellowship, Inc. ® Board of Directors

Date Proposal was received _____

Received by _____

Date of Reply _____ Replied to _____