

HUMANITARIAN FUNDS



How to write a CSR Proposal?

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Introduction

As NGOs, we raise funds mainly from three types of donors: Individual donors, including HNIs and Ultra HNIs, who provide mainly philanthropic donations;

1. Corporate donors, who provide donations, grants or even consultancies;
2. Institutional donors, including private foundations, public trusts, government agencies, bilateral and multilateral aid agencies, etc. that systemically give grants or support.

There are multiple channels to approach each of these types of donor. One of the channels to raise funds from Corporates is the CSR route—Corporate Social Responsibility, for which, generally, you would be required to submit a CSR Project Grant Proposal.

In this E-Book, we would try to understand how to write an effective CSR Proposal?

What makes a 'CSR Proposal' different from an 'Institutional Grant Proposal'

Before writing a CSR proposal, we must understand that it is based on certain expectations of a Corporate and thus, do not just send out a proposal that you had written for an institutional donor to a Corporate donor.

Following are the 3 key aspects that you must keep in mind before visualizing a CSR Proposal:

1. **Regulatory:** While Institutional Grant Proposals are governed largely by the concerned Company's own business and policies; a CSR Grant proposal is regulated by a number of laws (in each country) that legislate the CSR funds, projects and activities. Please refer to the relevant laws of your country.

For example, in India, as per the CSR Act- every obliged corporate (there are conditions that describe which corporate is obliged to carry out their CSR) is required to invest at least 2% of their net annual (aggregate of previous 5 financial years) profit in CSR.

Similarly, the 'Type of activities' that can be considered under CSR funded projects are described under Schedule VII of the Companies Act 2013. Based on the CSR Act, the Corporates are expected to make their own policies and get the same approved by their Boards. Thus, while submitting a grant proposal, it is important to ensure that your proposal is aligned to the Company's CSR policy.

2. **Project types:** Usually, the focus of an institutional donor is to make an impact on wider aspects of a specific theme, whereas a CSR donor usually focuses on a community/ a geographical unit or a specific agenda, that aligns well with their business—domain of business or even the geographical location of their operations.

For example, the likelihood of getting funding for a generic development research work or an organizational development project funded from an institutional donor compared to a CSR one. Instead, a company is likely to fund your project idea/proposal, which falls within their priority theme/geographical location, under their CSR mandate.

3. **Complexity:** Given that it counts as a 'social responsibility', the CSR donors tend to have a greater bent towards emotional and humane aspects and the PR values. For example, in a CSR proposal, the Corporate would focus more on the number of beneficiaries impacted, instead of an in-depth theoretical project idea. Thus, the socio-economic realm of a CSR project is likely to be more complex and crucial compared to many non CSR funded projects.

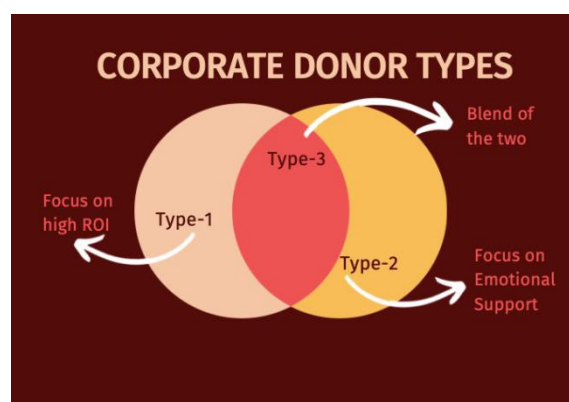
Thus, you must understand the type of Corporate that you are reaching out to and accordingly plan the proposal to align it well with corporate donor's CSR obligations

Understanding Corporate Donors

Understanding Corporate donors are the most important step in raising funds through CSR. It is so because there are different motivations for a Corporate to fulfil their CSR obligation.

It thus becomes important to understand respective corporate's motivation and accordingly pitch your project idea.

In some ways, the context, is rather similar to that of individual donors who have their own commitments, priorities and expectations. Thus, if possible, you may even try to integrate funds raised through these two types of donors



Typically, the CSR corporate donors can be of three different types.

Type 1: Focus on high ROI - This could be in terms of financial or social impacts. They are the ones who, in the extension education terms, could be called as creators. They are those who would be willing to take risks and would leverage risky paths to enhance the impact of their funded project, many-folds. Thus, these kind of donors are more interested in long term projects.

Type 2: Focus on Emotional Support - These are social investors- want to support humanitarian aspects. They are early adopters—which implies that such corporate CSR donors would like to undertake activities that Type 1 (creators) have already created; and would expand those ideas further. They are the ones who would be willing to support mid to long term project ideas, i.e, 4-6 years.

Type 3: Blend of Type 1 and Type 2 - They are those who would like to see the 'win-win' scene for both their Company, as well as the project beneficiaries. Typically, all CSR Managers fall under this category. They fall under the late majority category- meaning those which would have passed through Type 1 and Type 2. They are likely to fund projects of short to medium term—say 1 to 3 year project.

How to evaluate Corporate Donors

Before you approach a Corporate donor, it is important to evaluate the type of Corporate donor and then apply for CSR grant accordingly.

As the famous saying goes- “One should spend 90 percent of time in planning and 10 percent in actual development”. This is applicable for CSR donors too.

Sources for Evaluation include:

- Go through the RFPs properly, if you are responding to the RFP. It will help you understand which type does the corporate CSR agency fit in.
- Go through their website, especially the particularly the section on past projects funded. It will give you an idea of the kind of work the Company is likely to support.
- Past Partners- Again, you can get the information either from the Company website or social media channels and will help you understand more about the donor type
- Networking- Finally, networking with CSR Manager or their Citizenship team and talking to them about the kind of projects they fund would also help you understand the donor type.
- Participation in CSR Forums- Many a times- CSR heads participate in CSR Forums or are speakers at events like Webinar. Listen to them about the kinds of projects they fund. This will help you evaluate the type of donor too.

Majority of Corporate donors are Type 3, followed by Type 2 and least are of Type 1. And each of the types would evaluate the proposal as per their specific focus.

Different Ways to Approach and Nudging of CSR Donors

Ways to Approach

There are different ways for approaching CSR donors:

1. **RFPs, or Request for Proposals:** One of the very obvious way of applying for CSR grant is through responding to RFPs. You could refer to various websites or platforms, including humanitarian.org to get information about latest CSR RFPs matching your organization's visions, mandate and work.
2. **Approach directly through a call or Email:** All Corporates may not release an RFPs for CSR. Thus, an alternate way would be to identify corporate who fund projects related to the themes that you work on or geographical locations where your work and agency is present, and evaluate in terms of which type they fall in and approach the ones which are relevant for you.
To approach directly, it is important to have a database of CSR donors. In case, CSR is mandatory as per regulatory requirements, like in India, you may be able to find the data on the Government's Website. Government of India website, releases such lists, and the same is available both themes as well as geographically wise. One can download the list and accordingly approach relevant corporates for CSR grant.
3. **Bulk mailing:** Bulk mailing of the concept note to relevant corporates from the list you developed is another effective way. Though the response rate is much lower than the other two.

Nudging

Two ways of Nudging:

1. **Send Monthly Updates i.e., Newsletters/social media messages. Some key components that it may include** - Welcome Message, One Project Update, A Beneficiary Story, etc. It must also include a call for Action.
2. **Send Nudges** - Pick up any of your project components/ Product and share details about the same and the impact it created. These showcase high Emotional Value or PR Values and thus, high probability of being picked up by the Corporate.

Once a CSR head from a multinational Corporate mentioned how an organization who never approached them for CSR funds and did not apply for an RFP, but is a partner currently. They were the one who kept sending the CSR head their monthly updates and nudges on a regular basis. Once, there was a directive from the Board to work on a specific focus, which he remembered reading about in their updates. He asked his team to approach them and currently, they have become one of their performing CSR partners!

3. **Present your Organization as a Thought Leader** - Participate in Webinars, organize webinars, Write about different topics in LinkedIn. These are some ways to present your organization as a thought leader in the sector. You must get noticed by the CSR community.

Steps to Planning a CSR Grant Proposal

Before you actually write the CSR proposal, it is advisable to follow these 9 steps. This step-wise guideline will be very useful for you when you and your team actually begin to write the proposal.

Step 1 Read the RFP carefully: It is important to read the RFP carefully, Check the eligibility of your organization to apply against the RFP. If your organisation is eligible, write down all requirements and if not, do not spend any further time on it, or alternatively try to find ways of making your organization eligible, for example, in some cases, if the RFP permits, applying for projects in partnership with another agency may make your organisation also eligible.

Step 2 Understand the corporate donor well: As mentioned earlier, identify the 'type' of CSR Corporate donor—type A focus more on ROI; B focus more on the Emotional or Social Value and C- i.e., a blend of the two. This will help you define your organization's approach towards the RFP.

Step 3 Think 'the Solution' you are proposing: Follow the RFP, the problem statement is already mentioned; develop a draft on the solution you could propose and the methodology to apply the solution. If it is not given, you may get some clue from the RFP or in the worst case, visit the CSR section on the Corporate Website and read about the focus and past projects of the Corporate donor. Again, keep in mind the corporate donor type while proposing a solution.

Step 4 Organisation's Competence: Check if your organisation is competent to implement the proposed solution. No point in proposing something that your organisation is not competent to deliver as the same will be visible from your organisation's background. The corollary of this is also true—do not propose a solution that your organisation is competent to deliver, but even you yourself are not confident if it will solve the problem that the corporate donor plans to address in their RFP.

Step 5 Preliminary Data Collection (primary or secondary): Conduct a quick research and collect relevant data related to the problem stated. While collecting data do ensure that you collect updated data. In 2021, no point of sharing what happened in 1900 or even post liberalization in India in 1990's; whereas data should be of 2015-16. Again source of data is also important. It is advisable to use Government data. It is also advisable not to use random media reports unless it is quoted from a recognized source like the UN or Government Report. Data mentioned in the Interviews are to be avoided unless you can get the same vetted from a verified source.

Step 6 Get the Baseline Established: If you have already done some baseline preparation to support your proposals and show its merit, write down these details. This shows your competence and ability to understand the problem (as stated in the RFP) and the stated solution, thereby making your organisation a likely good agency for undertaking the assignment.

Step 7 Develop a draft on Resources: Enlist resources that you would need and those you have that could be spared for the project, even partially. It's important that you have analyzed the 'resource requirement' for effective implementation of the proposed solution. This will help develop a draft budget. Check this against the amount mentioned in the RFP. If it is approximately the same, go ahead with further planning. You must also identify Collaborations you could undertake including experts you would engage in the project, etc.

Step 8 Scale-up possibility: If the solution that you are proposing, has possibilities of scale-up; identify and note the same. Most Corporate donors wish to see that what they are supporting is unique and that it can be replicated and adopted.

Step 9 Exit Plan: Think about the exit plan. It's important that the solution you propose in your project proposal is sustainable, and thus has a clear exit plan. Most Corporate donors, particularly Type-2 or 3 wants to see this.

Developing a CSR Proposal

The design and structure

A CSR proposal framework can be divided into 3 sections:

Section 1: Introductory

- **A brief executive summary** - Highlighting the problem, the proposed solution you are proposing and your methodology, i.e., how do you see this solving the problem.
- **About the Organization** - Brief history, vision, mission, focus areas, past projects, experiences and partners. Remember to include only those that is relevant to this project.
- **Introducing the proposed intervention** - Start with a brief context which would include the problem with relevant data, Goal and Objectives of the proposed project.

Section 2: 3 W's (Why, What and When) and 1 H (How) of Proposal

1. **Why i.e., the need or the rationale or the problem statement.** Sometimes, RFPs do specify the problem. As mentioned earlier in steps, even if it is defined, Visit CSR section of the Corporate and understand their focus. And finally state the problem statement. The 'Context' which you established earlier will help refine this problem statement well. Also with reference to the problem, you would be required to define the specific geographical location/s where the project would be undertaken and the primary beneficiary group/s.
2. **What i.e., the solution or the intervention that you are proposing.** Must refer the schedule VII of the Indian CSR policy framework and ensure that the activities being proposed by you will indeed qualify the proposed project as a CSR spends by the Company.
State clearly the strategy that you propose as the solution and how the same is sustainable; what are the risks associated with the solution, assumptions, etc. must also be presented. It must read through like you fully understand how the earlier stated problem can be solved and the same is prescribed under their CSR policy. Relevant aspects of the steps, like baseline details, if any, must also be integrated.

CSR Proposal: The Number Game

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3. **How? Here you should talk about your implementation strategy, approach and the model**, including the proposed processes and methodology. My suggestion would be to present the process of implementation, under 3 phases or heads- initiation, actual implementation and sustainability. Under this, you may include:
 - **Team:** Recruitment, reporting structure and their training
 - **Key Activities with a timeline:** All activities proposed to be undertaken in the project and at what point in time during the project implementation
 - **Stakeholder engagement, including** the donor engagement.
 - **Collaborations:** If you would undertake any other collaborations, must highlight here.
 - **Resources:** If you already have some resources, do specify the same and highlight what further resources would be required i.e., project budget. The section should present the value for the money of the donor that you bring through executing the project.
 - **Technological Intervention:** Post Covid-19, It is noticed that there are increasing focus of donor on technological intervention. Must highlight the same if you too are proposing any, both in what and how, wherever possible, do highlight the technological intervention that would be undertaken in the program.
4. **When: The detailed timeline/time schedule**, as most donors would be interested in the project getting completed within the time schedule. Thus, you may include a detailed implementation schedule, while presenting a realistic time schedule. One way to present this is a Gantt. A chart which is basically a detailed plan of which activity will be conducted in which month, presented in the form of a chart.

Section 3: A Logical framework

Sometimes, the CSR partner gives you a framework for sharing the logical framework. If not, you may follow this.

INPUTS	OUTPUTS	OUTCOMES	IMPACTS
(All that you will need for the project including the activities that you would conduct in the project. Example- training of teachers on education pedagogy)	(Against each input item, share what you expect the result. Example- teachers trained in pedagogy)	(Against each output, share the benefit this will provide. Example- trained teachers, they will be able to better handle the learning of the students)	(Through this what are you going to achieve. Example- learning level of students increased by 10%)

You may have as many items listed under each column as relevant. You must ensure, that the impacts that you are mentioning, you are able to show their accomplishment through the logical framework. Thus, if you already have the baseline, that becomes the basis of the measurement. If your baseline is very basic and does not cover all details that you plan to impact from the project, must propose a detailed baseline in your input itself.

Also include aspects like monitoring of the project and how do you plan to evaluate each input that was provided and outcomes.

Sometimes, for this, in the logical framework, Corporates do ask for aspects like- indicators, means of verification. Indicator is a field/state of the outputs which would 'indicate' that an

activity has been done, which means that the corresponding 'input' as stated in the logical framework as being provided appropriately. Trained teachers are an indicator and this you can verify from the workshop report, which is the source of verification.

Another data sometimes asked by the CSR donor is risks and mitigation. This is just to ensure that you have visualized and also planned for the possible risks and if so, the donor wants to know how would you overcome, in case a risk becomes real?

For the above example- a possible risk could be 'travel approval of teachers' for the training not granted by the authority. And the mitigation you could propose is signing of the agreement with the education department. This gives confirmation to the donor that you are in complete control of the project.

Some Do's, Don'ts, and a Checklist of a CSR Proposal

A. Do's of CSR Grant Proposal

- Follow the RFP strictly: and address all aspects mentioned in the RFP
- Read the proposal again and again. Do not leave any ambiguity. If there are word limits stated in the RFP, strictly follow the same. It's better to be 5-10 words lesser.
- Ensure following 80:20 principle with only 20% focus on describing your own organisation and your past work. The donor is not just interested about your experience, but majorly about your intervention and how are you going to make a difference.
- Use of updated information. You are in 2021. No point of stating what happened in 1990; instead focus on era post 2015-16.
- Practice 4 C's- Clarity, Concise, Concrete and Comprehensive. If there are certain information that could better be explained through infographics, graphs, etc. Use them instead of writing long confusing paragraphs
- Strictly follow the timeline. If timeline stated, is mid-night; do not wait till then. Complete it before normal office closure timing in your country (say, 6 pm or so).

B. Don'ts of CSR Grant Proposal

- Do not copy paste content from other proposals. We have a habit of copy-paste even in proposals. Sometimes, while doing copy, paste, we miss our even changing the name of the original organization.
- Do not provide false information. If there are certain controversies, upfront state it instead of hiding the same.
- Do not provide unnecessary information. Read the RFP properly and provide only relevant information and be to the point.
- Do not make your proposal too flashy with different fonts and colors. Rather make it simple and readable.
- Do not make false promises. Talk about only those inputs that your agency can do and show impacts, based on your previous experiences.
- Do not be unrealistic with the budget and the timeline. Many a times, the donor first looks at the budget at the same clearly defines the activity and resources needed. If these are present unrealistically, however strong your proposal is, might be just rejected

C. A Checklist before you submit your proposal

- Think, Read, Write and Read again. As is said, practice makes a human being perfect. While reading it again and again, you would realise you can further improve the proposal. Do as many times, you can do it.
- Finally, let a relevant and competent person in your agency, who was not involved in developing the proposal, read it for its communication value.
- Cross check all information and the list of documents to be furnished- From RFP, you may have made a list. Ensure you have ticked all. If you miss out any key information and document, the proposal may outright be rejected.
- Do a spell check. Sending proposal with incorrect spelling creates negative impact.
- Format the document. The proposal should be readable and should look neat. Unformatted documents give the wrong impression.

- Ensure to submit within the timeline mentioned. Do not wait for the last minute. Many a time, on the last date, even at 11.59 pm we are submitting the proposal.

Timely and properly presented CSR proposals has better chance to get approved.

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