



REQUIRED FOR ALL ORGANIZATIONS THAT WISH TO PARTNER WITH THE HEALTH LITERACY FOUNDATION (HLF)

TO: (Organization Requesting Training and Technical Assistance From HLF)
PURPOSE: ORGANIZATIONAL BACKGROUND MATERIALS REQUESTED FROM POTENTIAL FUNDING PARTNER(S) FOR PROJECTS AND/OR PROGRAMS

EXECUTIVE SUMMARY

- Please answer these questions succinctly to help us assess your organization, so that we may create a viable plan and provide background for initiatives.
 - What is your organization's name?
 - What is your organization's purpose?
 - What is your organization's history? Describe your organization's inception, growth, and impact. Please be brief.
 - What are your organization's unique strengths?
 - What are your organization's advantages? Describe what makes you different.
 - What are your organization's services?
 - What are your organization's products (if applicable)?
 - What or who is the target market or beneficiary population of your organization?
 - What is your organization's operational plan?

BODY OF THE PLAN AND OVERVIEW OF YOUR ORGANIZATIONAL STRUCTURE

- Please answer the following questions.
 - Please provide two or three sentences describing your organization's corporate structure, including subsidiaries (if any).
 - Please provide two or three sentences describing your organization's stage of maturity (when formed, growth pattern, etc.).
 - Please provide two or three sentences describing your organization's overall objectives.
 - Please provide two or three sentences describing your organization's expansion plans (if known).
 - Please provide two or three sentences describing industry trends that affect your organization (local, regional, and/or national, if applicable).

PROGRAMS OR SERVICES AND/OR PRODUCTS

- Please answer the following questions.
 - Describe the programs, services, and/or products that your organization provides as well as any special features of service delivery, benefits to the population, and future development plans for existing projects.
 - Include any information on any copyrighted, trademarked, service marked, or patented items your organization has protected (if applicable).
 - Please include information on any new services, programs, or products you are planning to launch within the next year.

MARKETING PLAN FOR YOUR BENEFICIARY POPULATIONS

- Please answer the following questions.
 - Describe your target market population (and any subsectors), beneficiaries, or recipients of your services.
 - Age or age range(s)
 - Socioeconomic status
 - Location/region
 - Educational attainment
 - Marital status
 - Ethnicity
 - Insured, underinsured, uninsured (working or nonworking)
 - What is the market for your product (if applicable)?
 - What are some of the trends and importance of the need for your organization's services?
 - What are your current competitive obstacles?
 - What are your current distribution channels for making your target population aware that you exist? How do you get the word out?
 - What promotional efforts have you undertaken in the last year (fundraising, events, etc.)?
 - What is the projected number of beneficiaries who will use your services (patients, clients, people, etc.) in the next year?
 - What costs will be necessary to continue your services or market your product (when applicable)? Note any excess or unforeseen costs that you may have experienced in the past that will need to be included in future plans.
 - Please attach any samples of promotional materials you use for your organization if they currently exist.

OPERATIONAL PLAN

- Please answer the following questions.
 - Tell us about your organization's short-term plans and long-term plans, if any, for sustainability.
 - What is the location of your organization, facility, or clinic? Please include any satellite operations, current partnerships, current program(s), and service(s) under development.
 - What is your approach to partnerships on behalf of your beneficiary population(s)? Do you require a memorandum of agreement? Are roles and responsibilities detailed?
 - How do you evaluate and maintain data on program(s) and service(s)?
 - Do you use software to collect data? How do you compile, aggregate, and analyze data?
 - Do you share your organization's data for resource leveraging, or is it proprietary?

MANAGEMENT AND ORGANIZATIONAL TEAM

- Please respond to the following points.
 - Describe your management team, principals, key management employees, board members, advisory board members and their expertise, and active financial sponsors. (Federal, state and local proposals often consider the backgrounds and management team expertise as one of the most important factors in deciding to award money for programs and services. This is also true for the nonprofit foundation sector and for corporate, for-profit sponsorships.)
 - Attach an organizational chart if you have one, and explain the lines of authority and responsibility as well as an assessment of current and future projected staffing needs.

MAJOR MILESTONES

- Please answer the following question.
 - Describe major programs, services or organizational milestones, and describe briefly how your organization plans to accomplish its goals. If possible, please include a timeline and/or schedule of any planned major events.



CAPITALIZATION

- Please answer the following questions.
 - Describe the organization's capital structure. (Do you have a grants officer? Who approves your expenses?)
 - Does your organization have any outstanding loans and/or bad debts?
 - Please tell us about any resource leveraging and in-kind assistance you receive from subsidiary relationships (partners, other funding streams, etc).

FINANCIAL PLAN

- Please answer the following question.
 - Tell us about your organization's current and projected financial status. If possible, include the most recent Form 440 you submitted to the Internal Revenue Service.

CONSIDERATIONS

- Please answer the following so that HLF understands more fully your organization's needs, your expectations of HLF, and any training and technical assistance needs, etc., that you may have.
 - Please articulate your organization's request and/or need(s) for funding, grant awards, major contributions, in-kind support, and so on.
 - Include any potential funding opportunity you've already researched and a copy of the request for proposals, if you have it.
 - Include the specifics of your need(s). Please list them one at a time.
 - Examples:
 - Organizational support (staffing)
 - Bricks and mortar funding (buildings/maintaining offices, etc.)
 - Program planning
 - Program development
 - Program implementation
 - Program evaluation
 - Literacy tools, e.g., toolkits, train-the-trainer books, DVDs, CD-ROMs, or any special needs such as low-literate population materials and non-English language materials (specify language)
 - Any additional need(s)
 - What is the top priority for funding that your organization would like to pursue in partnership with HLF?

ATTACHMENTS

- Please include the following (if applicable).
 - Depending on your organization, you might wish to include some or all of the following:
 - Résumés or CVs of key management personnel
 - List of board members
 - Organizational charts
 - Data (graphs or illustrations)
 - Algorithms and/or matrices
 - Brochures and/or literature already in use

WORKING ALGORITHM FOR ORGANIZATIONS THAT WISH TO PARTNER WITH THE HEALTH LITERACY FOUNDATION FOR FUNDING OPPORTUNITIES:

TO: (Organization Requesting Training and Technical Assistance From HLF)
PURPOSE: POTENTIAL PROGRAMING AND/OR PLANNING INFORMATION REQUESTED FOR PROJECT DEVELOPMENT PROPOSALS

NOTE: HLF understands that it's difficult to foresee exactly what you may want to do. It's important for your organization to know that many, if not most, requests for proposals and notices of funding availability [correct????] have very specific guidelines. Using the information we receive, HLF can assist you in honing your project or program to "fit" a funding stream's guidelines. If it is not a viable option, HLF will make alternative suggestions for projects or submissions.

If you do not have all of the information we request, that's okay. This document is intended to be used as supporting information that will help your organization in its funding process.

TYPE OF PROGRAM OR PROJECT

- Please help HLF understand what your new project will be!
 - Describe the new project, program, or expansion idea.
 - Where does it fit organizationally?
 - Who will benefit? Describe the target population.
 - What are the demographics of your beneficiary population?
 - How will your organization benefit?
 - How does the project, program, or expansion idea fit into your organization's mission?
 - What is your organization's rationale for implementation? Explain the reasons why you chose this particular idea.

INDUSTRY INFORMATION

- Please answer the following questions as best you can.
 - Provide information on the broader area of interest for which the proposal is targeted.
 - Please include any local, state, regional, and/or national statistics that you believe will strengthen the proposal.
 - Please outline any trends, changes, anticipated milestones, controversies, and special qualities your organization is prepared to bring to the table, if funded.

RESOURCE NEEDS

- Please answer the following as best you can.
 - Describe in detail the amount of financial and other resources (such as staffing, equipment, or facilities) required to properly implement the project or program.
**Attached is a line item justified budget worksheet to help you in determining need.*

- Detail any specialized equipment or employee skills you will need to develop or implement the project or program.

TARGET POPULATION(S) AND/OR NICHE MARKETS

- Please answer the following questions.
 - Describe the intended target population(s) and/or niche markets.
 - Who are they?
 - What are their current needs?
 - How will your organization address those needs?
 - How will your organization reach the target population or niche market, and why do you think the target population might prefer your organization over another? Present any special concerns such as cultural competency or sensitivities, special needs, etc.

ASSESSMENT OF BENEFITS

- Please answer the following questions.
 - Describe how your project or program will provide value-added services to the organization and to the community at large (as a whole to the beneficiaries).
 - What might be the growth and short-term potential if this project or program is funded and implemented?
 - Describe any potential positive impacts on, and solutions to, current problems associated with implementing this new program or initiative.

ASSESSMENT OF DISADVANTAGES

- Please answer the following questions.
 - Describe any obstacles, potential negative impacts, and problems associated with implementing this new program or initiative.
 - Discuss potential risks as well as potential political and legal complications (if applicable).
 - Additionally, consider any potential risk to the organization's tax-exempt status, if applicable. This is unusual unless the organization is partnering with a for-profit corporation or if any conflict of interest is presented by officers of the organization.

FINANCIAL REVIEW

HLF will help your organization complete a fully justified budget that follows the guidelines for any given request for proposal, and also assist in the evaluation/outcomes (return on investment of funding) process.



RECOMMENDATION

Based on the information provided above, the Health Literacy Foundation will develop and recommend potential funding streams to the organization, help develop a plan of action or approach, and provide training and technical assistance for implementation.

If the project is not viable because of the lack of current opportunities or limited sources for any given target population, HLF may postpone and recommend a delay in submission, but continue to develop and rework the project or program to strategically gain funding.

Although HLF carefully considers and leverages all possibilities, including the development of strategic partnerships, HLF does not guarantee funding for any given project or program. With mutual understanding and approval, HLF may recommend that your project or program might be better served by a different organization or opportunity.