HOPE

TRAINING AND DEVELOPMENT INSTITUTE, LLC

MASTER GRANT PROPOSAL TEMPLATE

Workforce, Leadership, Conflict Resolution, Customer Experience, and Organizational Development

Team Building • Conflict Management • Customer Service
Emotional Intelligence • Leadership Development
MBTI®-Informed Development • TKI® Conflict-Mode Applications

Funding Organization	**[INSERT FUNDER NAME]**
Funding Opportunity	**[INSERT PROGRAM / RFP TITLE]**
Project Title	**[INSERT PROJECT TITLE]**
Amount Requested	**[$INSERT AMOUNT]**
Project Period	**[INSERT START - END DATES]**
Submission Deadline	**[INSERT DATE AND TIME ZONE]**

Prepared by Jeff "The Bee of Hope" Kennedy
Founder / Lead Facilitator
Certified MBTI Practitioner • Certified Thomas-Kilmann Conflict Mode Instrument Practitioner

CONFIDENTIAL TEMPLATE - Replace all bracketed placeholders and remove instructional notes before submission.

A. Template Use and Submission Controls

TEMPLATE INSTRUCTION: *This is a master template, not a funder-specific final application. Replace every red bracketed placeholder, follow the exact RFP order, comply with word and character limits, and delete all yellow instruction boxes before submission.*

Grant-Readiness Rule

A strong proposal aligns the funder's priorities, the documented need, the project design, the evaluation plan, and the budget. No proposal can guarantee an award. This template is designed to improve competitiveness through disciplined alignment, measurable outcomes, clear evidence, and credible implementation planning.

Submission Control	Required Entry
Applicant legal name	HOPE Training and Development Institute, LLC
Applicant type	INSERT: LLC / for-profit / social enterprise / other
UEI / EIN / vendor number	INSERT OR WRITE "NOT REQUIRED"
Physical and mailing address	INSERT COMPLETE ADDRESS
Primary contact	Jeff "The Bee of Hope" Kennedy - INSERT PHONE AND EMAIL
Website / grant portal account	INSERT URL / USERNAME OWNER - NEVER INSERT PASSWORD
Eligible applicant status confirmed	YES / NO - cite the RFP section
Fiscal sponsor or nonprofit partner, if required	INSERT NAME AND AGREEMENT STATUS
Authorized signer	INSERT NAME AND TITLE

Eligibility checkpoint for an LLC
Before investing significant time, confirm that the opportunity permits for-profit entities or LLCs. Some foundations accept only tax-exempt organizations. When appropriate and lawful, an LLC may participate through a funded contract, government/vendor opportunity, workforce grant, corporate sponsorship, or a written partnership or fiscal-sponsorship arrangement with an eligible nonprofit. Verify each funder's rules and obtain professional legal and tax review where needed.

Final Pre-Submission Checklist

- ☐ The organization and project are eligible under the published guidelines.
- ☐ The project title, request amount, dates, and service area are consistent everywhere.
- ☐ Every claim, statistic, credential, partnership, and past-performance statement is accurate and supportable.
- ☐ The narrative, logic model, work plan, evaluation plan, and budget describe the same project.
- ☐ All attachments are named correctly, current, signed where required, and uploaded in the requested format.
- ☐ The proposal was reviewed for grammar, math, accessibility, confidentiality, and portal character limits.
- ☐ Submission occurs before the deadline, and confirmation evidence is saved.

B. Grant Cover Letter Template

TEMPLATE INSTRUCTION: *Customize this letter for the specific funder. Keep it to one page unless the funder requests otherwise. Use the funder's preferred salutation and emphasize the exact priority being addressed.*

[DATE]

[FUNDER CONTACT NAME AND TITLE]
[FUNDING ORGANIZATION]
[ADDRESS]
[CITY, STATE ZIP]

Re: [FUNDING OPPORTUNITY / PROJECT TITLE] - Request for **[$AMOUNT]**

Dear **[MR./MS./DR. LAST NAME OR REVIEW COMMITTEE]**:

HOPE Training and Development Institute, LLC respectfully submits this proposal to **[FUNDER NAME]** for support of **[PROJECT TITLE]**, a **[PROJECT LENGTH]** initiative designed to strengthen workforce performance, healthy team relationships, conflict-management capacity, customer service, emotional intelligence, and leadership effectiveness among **[TARGET POPULATION]** in **[SERVICE AREA]**.

The project responds to **[DOCUMENTED NEED]** by delivering a structured, evidence-informed training and development model that combines facilitated learning, practical workplace exercises, participant assessments, coaching or technical assistance, and measurable follow-up. Funding of **[$AMOUNT REQUESTED]** will enable HOPE to serve **[NUMBER OF PARTICIPANTS / ORGANIZATIONS]** and produce **[KEY DELIVERABLES]**.

HOPE is led by Jeff "The Bee of Hope" Kennedy, an experienced educator, military instructor, corporate trainer, mediator, and motivational speaker. His professional credentials include certification as a Myers-Briggs Type Indicator practitioner and certification in the Thomas-Kilmann Conflict Mode Instrument. Copies of credentials and supporting qualifications are included in the proposal exhibits.

We appreciate **[FUNDER NAME]**'s commitment to **[FUNDER PRIORITY]**. HOPE welcomes the opportunity to provide additional information and to work collaboratively toward sustainable improvements in workforce culture, customer experience, leadership, and community or organizational outcomes.

Sincerely,

Jeff "The Bee of Hope" Kennedy
Founder / Lead Facilitator
HOPE Training and Development Institute, LLC
[PHONE] | **[EMAIL]** | **[WEBSITE]**

1. Executive Summary

TEMPLATE INSTRUCTION: *Many reviewers score the executive summary first and use it to frame the rest of the proposal. Write this section last, then place it here. Use the funder's terminology and state the problem, population, solution, amount, outcomes, and organizational capacity in a compact narrative.*

HOPE Training and Development Institute, LLC requests **[$AMOUNT]** from **[FUNDER]** to implement **[PROJECT TITLE]**, a **[NUMBER-OF-MONTHS]**-month training and organizational development initiative serving **[TARGET POPULATION]** in **[GEOGRAPHIC AREA]**.

The proposed project addresses **[PRIMARY NEED / PERFORMANCE GAP]**. Local and organizational evidence indicates **[INSERT 2-3 VERIFIED DATA POINTS WITH SOURCES]**. These conditions affect employee engagement, teamwork, service quality, retention, leadership readiness, productivity, and the ability to resolve disagreements constructively.

HOPE will deliver an integrated curriculum in team building, conflict management, customer service, emotional intelligence, and leadership development. When appropriate to the funder and participant setting, the project will use MBTI-informed learning and the Thomas-Kilmann Conflict Mode Instrument to help participants understand communication preferences, conflict approaches, and practical methods for improving workplace relationships. Activities will include **[WORKSHOPS / COHORTS / COACHING / ASSESSMENTS / TECHNICAL ASSISTANCE]**.

By the end of the grant period, HOPE expects to achieve the following: **[NUMBER]** participants enrolled; **[PERCENT]**% completing the program; **[PERCENT]**% demonstrating measurable knowledge or skill gains; **[PERCENT]**% reporting improved confidence in managing conflict, serving customers, and leading teams; and **[NUMBER / PERCENT]** organizations or supervisors documenting changes in workplace practice.

HOPE's capacity is grounded in the founder's extensive experience in education, military instruction, corporate training, mediation, conflict resolution, and community leadership, supported by certified-practitioner credentials in the Myers-Briggs Type Indicator and the Thomas-Kilmann Conflict Mode Instrument. The project budget will support **[PERSONNEL]**, curriculum and materials, participant access, assessment tools, technology, evaluation, travel or facilities, and required administration. HOPE will sustain the work through **[EARNED REVENUE / CONTRACTS / PARTNERSHIPS / SPONSORSHIPS / TRAIN-THE-TRAINER]**.

Project Element	Proposal Entry
Project title	INSERT PROJECT TITLE
Amount requested	$INSERT AMOUNT
Project period	INSERT DATES
Target population	INSERT WHO WILL BE SERVED
Geographic service area	INSERT COUNTIES / CITIES / STATES
Primary outcome	INSERT ONE-SENTENCE RESULT
Participants / organizations	INSERT NUMBERS
Primary partners	INSERT PARTNER NAMES

2. Organization Profile and Capacity

Organization Overview

HOPE Training and Development Institute, LLC is a **[FOR-PROFIT / SOCIAL ENTERPRISE / CONSULTING AND TRAINING ORGANIZATION]** established to help individuals, teams, organizations, and communities improve performance through practical education, facilitated development, and human-centered leadership. HOPE's core service areas are team building, conflict management, customer service, emotional intelligence, leadership development, mediation-related education, and workforce or community capacity building.

Mission: [INSERT APPROVED MISSION STATEMENT]

Vision: [INSERT APPROVED VISION STATEMENT]

Values: [INSERT 4-6 VALUES, SUCH AS SERVICE, EXCELLENCE, INTEGRITY, RESPECT, ACCOUNTABILITY, AND HOPE]

Founder and Lead Facilitator Qualifications

Jeff "The Bee of Hope" Kennedy brings a multidisciplinary background in military instruction, education, corporate training, human resources, organizational leadership, mediation, conflict resolution, motivational speaking, and community engagement. Customize the following credential summary to match the supporting documents included in the exhibits:

- Certified Myers-Briggs Type Indicator (MBTI) Practitioner - INSERT ISSUING ORGANIZATION, DATE, AND CREDENTIAL NUMBER IF APPLICABLE.
- Certified Thomas-Kilmann Conflict Mode Instrument (TKI) Practitioner - INSERT ISSUING ORGANIZATION, DATE, AND CREDENTIAL NUMBER IF APPLICABLE.
- Graduate education in human resource management, conflict management / conflict resolution, and organizational management - INSERT EXACT DEGREE NAMES, INSTITUTIONS, AND DATES.
- Certified mediator / conflict-resolution professional - INSERT ISSUING AUTHORITY AND STATUS.
- Retired U.S. Army professional and experienced military instructor - INSERT YEARS, ASSIGNMENTS, AND RELEVANT TRAINING RESPONSIBILITIES.
- Experienced educator, college instructor, corporate trainer, motivational speaker, and community leader - INSERT VERIFIED YEARS AND REPRESENTATIVE CLIENTS OR PARTNERS.
- Five-time Fort Knox Mediator of the Year - VERIFY OFFICIAL AWARD TITLE, YEARS, AND DOCUMENTATION BEFORE SUBMISSION.

Credential integrity standard
List only credentials that can be verified through certificates, transcripts, licenses, awards, official biographies, contracts, or letters. Do not inflate years of experience, client lists, outcomes, or award history. Grant reviewers may conduct due diligence.

Organizational Capacity

Capacity Area	Current Capacity / Evidence	Grant-Funded Strengthening
Leadership and governance	INSERT OWNER, ADVISORS, POLICIES, AND DECISION RIGHTS	INSERT BOARD / ADVISORY / COMPLIANCE ACTIONS
Program delivery	INSERT FACILITATORS, CURRICULUM, DELIVERY HISTORY, AND CLIENTS	INSERT STAFF / CONTRACTORS / MATERIALS
Financial management	INSERT ACCOUNTING SYSTEM, BOOKKEEPER, CONTROLS, AND REPORTING	INSERT GRANT CODING / AUDIT / REVIEW SUPPORT
Technology and records	INSERT CRM, MICROSOFT 365, LEARNING PLATFORM, AND SECURITY	INSERT LICENSES / DATA MANAGEMENT / ACCESSIBILITY
Evaluation	INSERT SURVEYS, ASSESSMENTS, ATTENDANCE, AND REPORTS	INSERT EXTERNAL EVALUATOR OR DATA SUPPORT
Partnerships	INSERT EMPLOYERS, SCHOOLS, NONPROFITS, VETERAN, YOUTH, OR COMMUNITY PARTNERS	INSERT LETTERS / REFERRALS / HOST SITES

3. Statement of Need

TEMPLATE INSTRUCTION: *This section must be evidence-based and local. Use current, authoritative data and cite the source, year, geography, and relevance. Do not rely only on national statistics when the project serves a specific county, employer group, school system, or community.*

Problem Definition

Organizations and communities in **[SERVICE AREA]** face a documented need for stronger **[TEAMWORK / CONFLICT MANAGEMENT / CUSTOMER EXPERIENCE / EMOTIONAL INTELLIGENCE / LEADERSHIP PIPELINE]**. The core problem is **[DEFINE THE PROBLEM IN ONE CLEAR SENTENCE]**. This challenge is most visible among **[TARGET POPULATION]** and is demonstrated by **[TURNOVER / COMPLAINTS / DISCIPLINE / LOW MORALE / SERVICE GAPS / SUPERVISOR VACANCIES / SURVEY RESULTS / INCIDENTS]**.

The need is supported by the following evidence: **[LOCAL DATA POINT 1 WITH CITATION]**; **[LOCAL DATA POINT 2 WITH CITATION]**; and **[ORGANIZATIONAL / PARTNER DATA POINT 3 WITH CITATION]**. These findings show that the issue is not simply a lack of information; participants need structured opportunities to practice communication, recognize conflict patterns, regulate emotions, serve customers consistently, and apply leadership behaviors in real situations.

Root Causes and Service Gaps

Root Cause / Barrier	Evidence	How the Project Responds
Limited access to affordable, high-quality professional development	INSERT DATA / INTERVIEWS / PARTNER INPUT	Subsidized or no-cost cohort-based training
Unaddressed conflict and communication breakdowns	INSERT COMPLAINT / INCIDENT / CLIMATE DATA	TKI-informed conflict skills, mediation concepts, practice scenarios
Inconsistent customer-service expectations	INSERT CUSTOMER FEEDBACK / QUALITY DATA	Service standards, empathy, recovery, and accountability modules
Low emotional self-awareness or stress-management capacity	INSERT SURVEY / SUPERVISOR INPUT	Emotional-intelligence learning, reflection, and coaching
Weak leadership pipeline or supervisor preparation	INSERT VACANCY / PROMOTION / RETENTION DATA	Practical leadership curriculum and action plans
Transportation, schedule, technology, language, disability, or cost barriers	INSERT PARTICIPANT BARRIERS	Hybrid delivery, accommodations, stipends, flexible scheduling, accessible materials

Why Funding Is Needed Now

Funding is timely because **[INSERT URGENCY: WORKFORCE CHANGE, EXPANSION, COMMUNITY NEED, POLICY SHIFT, CUSTOMER DEMAND, POST-CRISIS RECOVERY, OR PARTNER REQUEST]**. Without intervention, **[INSERT LIKELY CONSEQUENCES]**. With grant support, HOPE and its partners can create a coordinated, measurable response that reaches participants who otherwise may not have access to these services.

4. Project Description and Training Model

Project Purpose

The purpose of **[PROJECT TITLE]** is to strengthen individual and organizational performance by equipping **[TARGET POPULATION]** with practical skills in team building, conflict management, customer service, emotional intelligence, and leadership. The project will serve **[NUMBER]** participants and **[NUMBER]** organizations or community groups over **[PROJECT PERIOD]**.

Core Training Components

1. Team Building and High-Performance Culture

Trust, roles, strengths, accountability, communication agreements, collaboration, problem-solving, meeting practices, and team action planning.

2. Conflict Management and Constructive Resolution

Conflict diagnosis, escalation prevention, interests and positions, communication under pressure, difficult conversations, mediation concepts, and TKI-informed conflict-mode awareness.

3. Customer Service and Service Recovery

Customer expectations, listening, empathy, professionalism, consistency, de-escalation, complaint response, service recovery, follow-through, and measurable service standards.

4. Emotional Intelligence

Self-awareness, self-management, social awareness, empathy, relationship management, triggers, resilience, decision-making, and emotional accountability.

5. Leadership Development

Purpose, direction, motivation, ethics, inclusive leadership, delegation, coaching, performance feedback, change leadership, decision-making, and leadership action plans.

6. MBTI-Informed Communication and Development

When authorized and appropriate, participants explore personality preferences to improve communication, teamwork, leadership, and appreciation of differences. Use only within the limits of practitioner certification, licensing, and funder-approved costs.

Delivery Structure

Delivery Element	Template Design
Recruitment and referral	INSERT PARTNER REFERRALS, EMPLOYER NOMINATIONS, OPEN ENROLLMENT, OR TARGETED OUTREACH
Cohort size	INSERT IDEAL MINIMUM / MAXIMUM
Training dosage	INSERT HOURS PER MODULE, NUMBER OF SESSIONS, AND TOTAL CONTACT HOURS
Delivery format	INSERT IN-PERSON / VIRTUAL / HYBRID / ON-SITE
Assessments	INSERT PRE/POST SURVEYS, MBTI OR TKI WHEN LICENSED, KNOWLEDGE CHECKS, OBSERVATIONS
Practice and application	INSERT CASE STUDIES, ROLE PLAYS, TEAM CHALLENGES, COACHING, ACTION PROJECTS
Participant support	INSERT ACCOMMODATIONS, TECHNOLOGY, MATERIALS, TRANSPORTATION, CHILDCARE, STIPENDS, LANGUAGE ACCESS
Completion recognition	INSERT CERTIFICATE OF COMPLETION / CEU / DIGITAL BADGE, IF AUTHORIZED

Delivery Element	Template Design
Follow-up	INSERT 30/60/90-DAY COACHING, SUPERVISOR CHECK-IN, COMMUNITY OF PRACTICE

Training Principles

- Adult-learning methods that connect concepts to immediate workplace and community application.
- Respectful, culturally responsive facilitation that values differences without stereotyping participants.
- Practice-based learning through scenarios, reflection, role plays, feedback, and action planning.
- Confidentiality and psychological-safety expectations appropriate to the training environment.
- Accessible materials and reasonable accommodations consistent with applicable requirements and partner policies.
- Human review of all assessments, interpretations, legal or policy questions, and high-stakes personnel decisions.

5. Goals, Objectives, Outcomes, and Logic Model

TEMPLATE INSTRUCTION: *Use SMART objectives: specific, measurable, achievable, relevant, and time-bound. Replace suggested targets with figures that are ambitious, defensible, and supported by baseline data and delivery capacity.*

Project Goal

[INSERT ONE BROAD, LONG-TERM GOAL THAT DESCRIBES THE DESIRED CHANGE FOR PEOPLE OR ORGANIZATIONS]

Suggested Objectives - Customize

- By [DATE], enroll at least [NUMBER] eligible participants from [TARGET GROUP], with at least [PERCENT]% representing [PRIORITY POPULATION OR SERVICE AREA].
- By [DATE], at least [PERCENT]% of enrolled participants will complete at least [NUMBER]% of required training hours.
- Immediately after training, at least [PERCENT]% of completers will improve knowledge or skill assessment scores by at least [PERCENTAGE-POINT / PERCENT] compared with baseline.
- Within [30/60/90] days, at least [PERCENT]% of participants will report applying at least [NUMBER] new teamwork, conflict-management, customer-service, emotional-intelligence, or leadership practices.
- By the end of the grant period, at least [NUMBER] participating organizations or teams will adopt or improve [POLICIES / TEAM AGREEMENTS / SERVICE STANDARDS / LEADERSHIP PRACTICES].
- By [DATE], at least [PERCENT]% of supervisors, partners, or customers surveyed will report observable improvement in [SELECTED PERFORMANCE INDICATORS].

Logic Model

Inputs	Activities	Outputs	Short-Term Outcomes	Intermediate Outcomes
Grant funds; certified facilitator; curriculum; partners; technology; assessment tools; facilities; participant support	Recruit; assess; train; coach; provide technical assistance; collect data; report results	[NUMBER] cohorts; [NUMBER] participants; [HOURS] training; [NUMBER] coaching sessions; [NUMBER] action plans	Increased knowledge, self-awareness, conflict skills, service confidence, and leadership readiness	Improved team climate, constructive conflict, service quality, retention, supervisor effectiveness, and organizational practices

Performance Measurement Matrix

Outcome	Indicator	Baseline	Target	Data Source	Frequency
Participation	Number enrolled and demographic / service-area reach	INSERT	INSERT	Registration and CRM	Monthly
Completion	Percent completing required dosage	INSERT	INSERT	Attendance records	Each cohort

Outcome	Indicator	Baseline	Target	Data Source	Frequency
Learning	Change in knowledge or skill score	INSERT	INSERT	Pre/post assessment	Each cohort
Application	Percent using new practices	INSERT	INSERT	30/60/90-day survey	Quarterly
Team / service change	Change in selected workplace indicators	INSERT	INSERT	Supervisor, customer, climate, complaint, or operational data	Quarterly / endline
Satisfaction and quality	Participant rating and facilitator quality score	INSERT	INSERT	Evaluation survey / observation	Each session

6. Implementation Work Plan and Timeline

TEMPLATE INSTRUCTION: *Align the work plan with the project period, budget, staffing plan, and reporting deadlines. Replace the sample sequence with the funder's actual start date and milestones.*

Phase / Timing	Key Activities	Responsible Lead	Deliverables / Evidence
Phase 1: Start-up Months 1-2	Execute agreement; confirm eligibility and partner roles; finalize curriculum; establish data, confidentiality, accessibility, and financial procedures; launch outreach	Project Director / Grants Administrator	Signed agreements; final work plan; curriculum map; data tools; outreach plan
Phase 2: Recruitment and Baseline Months 2-3	Recruit participants; confirm eligibility; obtain consent; conduct orientation and baseline assessments; finalize accommodations	Program Coordinator / Partners	Enrollment roster; baseline report; cohort schedule; accommodation plan
Phase 3: Training Delivery Months 3-10	Deliver core modules; provide materials; monitor attendance; facilitate practice; provide coaching and technical assistance	Lead Facilitator / Contract Trainers	Session logs; attendance; materials; coaching logs; participant action plans
Phase 4: Application and Follow-up Months 4-11	Conduct 30/60/90-day follow-up; supervisor or partner check-ins; communities of practice; targeted refreshers	Facilitator / Evaluator	Follow-up surveys; case examples; improvement plans; partner feedback
Phase 5: Evaluation and Closeout Months 10-12	Analyze outcomes; reconcile grant; document lessons; prepare final report; sustainability and continuation plan	Evaluator / Project Director / Finance	Outcome report; financial report; sustainability plan; final deliverables

Milestone Tracker

Milestone	Due Date	Owner	Status / Evidence
Grant agreement and launch meeting	INSERT	INSERT	NOT STARTED / COMPLETE - LINK
Curriculum and assessment tools approved	INSERT	INSERT	INSERT
First cohort enrolled	INSERT	INSERT	INSERT
Midpoint performance review	INSERT	INSERT	INSERT
Final cohort completed	INSERT	INSERT	INSERT
Outcome and financial reports submitted	INSERT	INSERT	INSERT

7. Evaluation, Learning, and Continuous Improvement

Evaluation Questions

- Did the project reach the intended participants and priority communities?
- Did participants receive the planned training dosage and complete the program?
- What knowledge, skills, confidence, and behaviors changed?
- Which project components were most effective, for whom, and under what conditions?
- Did organizations or teams adopt new practices, and were service or workplace indicators affected?
- What barriers, unintended outcomes, and improvement opportunities emerged?

Data Collection Plan

Method	Purpose	Timing	Responsible Party
Registration / eligibility form	Participant characteristics, referral source, service area, consent	Enrollment	Program Coordinator
Pre/post knowledge or skill assessment	Measure learning change	First and final session	Facilitator / Evaluator
Attendance and dosage records	Verify participation and completion	Each session	Program Coordinator
Participant satisfaction survey	Quality, relevance, accessibility, facilitator effectiveness	Each session / cohort	Evaluator
30/60/90-day follow-up	Measure application and confidence	Post-program	Evaluator / CRM
Supervisor, partner, customer, or team feedback	Observe workplace or organizational change	Baseline / midpoint / endline	Evaluator
Operational indicators	Turnover, complaints, response time, incidents, engagement, or other approved metrics	Quarterly	Partner / Project Director
Focus group or interviews	Understand experience, barriers, and case examples	Midpoint / endline	Evaluator

Data Quality, Privacy, and Ethics

- Collect only information needed for program administration, evaluation, compliance, and funder reporting.
- Use informed-consent language appropriate to assessments, surveys, testimonials, photographs, recordings, and research-like activities.
- Separate confidential participant records from public marketing contacts and restrict access by role.
- Report aggregate results and suppress small-cell information when disclosure could identify participants.
- Do not use MBTI or TKI results as the sole basis for hiring, discipline, promotion, diagnosis, or other high-stakes decisions.
- Document instrument licenses, practitioner qualifications, data-retention rules, and authorized uses.
- Review progress monthly and use a written corrective-action process when enrollment, completion, quality, or outcomes fall below target.

External evaluator or evaluation lead: [NAME / ORGANIZATION / QUALIFICATIONS / PROCUREMENT STATUS]

8. Management, Staffing, Partnerships, and Governance

Project Staffing

Role	Primary Responsibilities	Minimum Qualifications / Named Person	Level of Effort
Project Director	Funder relationship, implementation, approvals, risk, quality, partner coordination	Jeff “The Bee of Hope” Kennedy / INSERT QUALIFICATIONS	INSERT FTE / HOURS
Lead Facilitator	Curriculum delivery, assessments, participant support, coaching, documentation	Certified MBTI and TKI practitioner / INSERT DETAILS	INSERT
Program Coordinator	Recruitment, scheduling, attendance, CRM, accommodations, logistics	INSERT	INSERT
Evaluator	Evaluation design, analysis, reporting, data quality	INSERT	INSERT
Finance / Grants Administrator	Budget monitoring, allowability, invoices, documentation, reports	INSERT	INSERT
Contract Trainers / Coaches	Specialized delivery, coaching, technical assistance	INSERT	INSERT

Partnership Framework

Partner	Role	Contribution	Documentation
INSERT PARTNER 1	Recruitment / host site / referrals / data / co-facilitation	INSERT CASH OR IN-KIND VALUE	Letter of commitment / MOU
INSERT PARTNER 2	INSERT	INSERT	INSERT
INSERT PARTNER 3	INSERT	INSERT	INSERT

Governance and Decision Rights

- The Project Director approves curriculum, staffing, partner commitments, public communications, and corrective actions.
- The Finance Lead reviews allowability, documentation, reconciliation, and reporting before submission.
- The Evaluator independently reviews data quality and outcome claims.
- Partners receive written scopes, confidentiality expectations, referral procedures, deliverables, and escalation contacts.
- Human approval is required for contracts, payments, personnel actions, legal conclusions, assessment interpretations, and crisis communications.

9. Access, Inclusion, Risk Management, and Participant Protection

Access and Inclusion Plan

HOPE will reduce participation barriers by providing **[FLEXIBLE SCHEDULING]**, **[IN-PERSON / VIRTUAL OPTIONS]**, **[ACCESSIBLE MATERIALS AND ACCOMMODATIONS]**, and **[TRANSPORTATION / CHILDCARE / TECHNOLOGY / LANGUAGE / STIPEND SUPPORT]** as permitted by the grant. Recruitment will be designed to reach **[PRIORITY POPULATIONS]** through trusted partners and communication channels.

Risk Register

Risk	Likelihood / Impact	Prevention / Mitigation	Owner / Trigger
Enrollment below target	INSERT	Multiple referral sources; early outreach; rolling enrollment; waitlist	Coordinator - below [X]% by [DATE]
Participant attrition	INSERT	Orientation, reminders, flexible make-up options, support, engagement check-ins	Coordinator - missed [X] sessions
Trainer capacity disruption	INSERT	Backup facilitators; documented curriculum; cross-training	Project Director - absence > [X] days
Assessment licensing or misuse	INSERT	Purchase approved licenses; follow practitioner terms; limit access and use	Lead Facilitator - license / use concern
Data privacy or security incident	INSERT	Role-based access, MFA, minimum data, incident-response plan	Data Owner - suspected disclosure
Budget variance or unallowable cost	INSERT	Monthly reconciliation, preapproval, procurement records, budget-to-actual review	Finance - variance > [X]%
Partner performance issue	INSERT	MOU, milestones, monthly review, corrective action, replacement options	Project Director - missed milestone

Participant Protection and Professional Boundaries

- Training is educational and developmental; it is not mental-health treatment, legal advice, or clinical diagnosis.
- Facilitators will use clear referral and emergency procedures when a participant discloses immediate danger, abuse, or other serious concerns.
- Assessment results will be explained respectfully and will not be used to label, stereotype, or limit participants.
- Conflicts of interest, complaints, accessibility requests, and incidents will be documented and escalated under written procedures.
- Appropriate insurance, contracts, releases, background screening, and venue safety requirements will be maintained based on the population and delivery setting.

10. Budget Template and Budget Narrative

TEMPLATE INSTRUCTION: *Use the funder's required budget form when provided. The table below is a planning template. All costs must be necessary, reasonable, allocable to the project, supported by documentation, and permitted by the award terms. Ensure calculations are exact.*

Total project cost: [$TOTAL PROJECT COST] Amount requested: [$GRANT REQUEST] Match / other support: [$MATCH OR $0]

Budget Category	Calculation / Basis	Grant Request	Other Support	Total
Personnel	[ROLE] x [HOURS/FTE] x [RATE]	$INSERT	$INSERT	$INSERT
Fringe benefits	[RATE]% of eligible salaries	$INSERT	$INSERT	$INSERT
Contractual / consultants	[SERVICE] x [DAYS/HOURS] x [RATE]	$INSERT	$INSERT	$INSERT
Assessment instruments and licenses	[NUMBER] MBTI / TKI or other approved units x [COST]	$INSERT	$INSERT	$INSERT
Curriculum and participant materials	[NUMBER] participants x [COST]	$INSERT	$INSERT	$INSERT
Travel and transportation	Mileage / lodging / transportation / participant access	$INSERT	$INSERT	$INSERT
Facilities and equipment	Room rental / approved equipment / accessibility	$INSERT	$INSERT	$INSERT
Technology and communications	CRM / learning platform / virtual delivery / data security	$INSERT	$INSERT	$INSERT
Participant support	Stipends / childcare / meals / transportation / technology, if allowed	$INSERT	$INSERT	$INSERT
Evaluation	Evaluator hours / software / reporting	$INSERT	$INSERT	$INSERT
Marketing and outreach	Design / printing / approved advertising / translation	$INSERT	$INSERT	$INSERT
Administrative / indirect	Approved rate or documented allocation	$INSERT	$INSERT	$INSERT
TOTAL		= SUM	= SUM	= SUM

Budget Narrative Template

Personnel

[Funds will support [ROLE/TITLE] at [FTE OR HOURS] for [RESPONSIBILITIES]. The rate is based on [SALARY / MARKET / POLICY BASIS].]

Fringe Benefits

[Fringe benefits are calculated at [RATE]% and include [ITEMS].]

Contractual / Consultants

[HOPE will procure [SERVICES] to provide [DELIVERABLES]. The estimate is based on [HOURS/DAYS] at [$RATE] and will follow [PROCUREMENT POLICY].]

Assessment Instruments and Licenses

[Funds will purchase authorized assessment materials or licenses for [NUMBER] participants. Use will be limited to qualified-practitioner administration and approved project purposes.]

Materials and Supplies

[This category covers [WORKBOOKS, PRINTING, FACILITATION SUPPLIES, CERTIFICATES, ACCESSIBLE FORMATS] at an estimated [$COST] per participant.]

Travel / Facilities / Technology

[Costs support [SPECIFIC DELIVERY NEED] and are calculated using [MILEAGE RATE / QUOTES / SUBSCRIPTION RATE].]

Participant Support

[Where allowable, funds will reduce access barriers through [STIPENDS / TRANSPORTATION / CHILDCARE / MEALS / TECHNOLOGY]. Eligibility and documentation procedures will be maintained.]

Evaluation

[Funds support [EVALUATOR / SOFTWARE / DATA COLLECTION] needed to measure outputs, outcomes, quality, and continuous improvement.]

Administrative / Indirect

[Administrative or indirect costs are calculated using [APPROVED RATE / DE MINIMIS IF APPLICABLE / DOCUMENTED ALLOCATION] and support [FINANCE, COMPLIANCE, RECORDS, INSURANCE, REPORTING].]

11. Sustainability, Scalability, and Long-Term Value

Sustainability Strategy

HOPE will sustain the project beyond the grant period through a diversified strategy that may include **[FEE-FOR-SERVICE CONTRACTS]**, **[EMPLOYER OR GOVERNMENT TRAINING AGREEMENTS]**, **[CORPORATE SPONSORSHIP]**, **[FOUNDATION OR PUBLIC GRANTS]**, **[TRAIN-THE-TRAINER REVENUE]**, and **[PARTNER COST SHARING]**. The project will prioritize reusable curriculum, facilitator capacity, documented procedures, and outcome evidence that can support continuation and expansion.

Sustainability Lever	Year 1 Action	Post-Grant Target
Earned revenue	Develop pricing, contracts, and service packages	[PERCENT]% of annual program cost
Partner investment	Secure cash or in-kind commitments	[NUMBER] recurring partners
Train-the-trainer	Prepare internal facilitators or partner champions	[NUMBER] qualified trainers / champions
Reusable curriculum and digital resources	Create standardized modules and quality controls	Reduce per-participant cost by [PERCENT]%
Outcome evidence	Publish funder-approved report and case examples	Use evidence in [NUMBER] proposals / contracts
Diversified funding	Maintain a 12-18 month opportunity pipeline	No single source above [PERCENT]% of revenue

Scaling Plan

- Pilot and validate the model with [INITIAL POPULATION / SERVICE AREA].
- Standardize curriculum, facilitation guides, assessment protocols, and quality scorecards.
- Use outcome and cost data to refine delivery dosage and participant support.
- Expand through partner sites, licensed content where authorized, hybrid delivery, and trained facilitators.
- Protect quality through certification requirements, observation, participant feedback, data review, and version control.

12. Conclusion and Funding Request

TEMPLATE INSTRUCTION: *End with a confident, specific request tied directly to the funder's mission. Do not introduce new programs, unsupported claims, or budget items in the conclusion.*

HOPE Training and Development Institute, LLC respectfully requests **[$AMOUNT]** from **[FUNDER]** to implement **[PROJECT TITLE]**. This investment will enable **[NUMBER]** participants and **[NUMBER]** organizations or teams in **[SERVICE AREA]** to build the practical skills needed for stronger teamwork, constructive conflict, exceptional customer service, emotional intelligence, and effective leadership.

The project is designed to produce measurable results through structured training, participant assessment, workplace application, coaching or technical assistance, partner engagement, and disciplined evaluation. With the support of **[FUNDER]**, HOPE will help participants move from awareness to action and help organizations create healthier, more accountable, and more effective cultures.

For additional information, please contact Jeff "The Bee of Hope" Kennedy at **[PHONE]** or **[EMAIL]**.

Required and Recommended Attachments Checklist

- ☐ Funder application form and signed certifications / assurances
- ☐ Project budget and budget narrative in required format
- ☐ Organizational formation documents and W-9 / vendor documents, if requested
- ☐ Current financial statements, tax returns, audit / review, or management reports, if requested
- ☐ Resume or curriculum vitae for the Project Director and key personnel
- ☐ Exhibit A - MBTI Practitioner Certificate
- ☐ Exhibit B - Thomas-Kilmann Conflict Mode Instrument Practitioner Certificate
- ☐ Exhibit C - Degrees, mediation, instructor, and other relevant certificates
- ☐ Letters of commitment, support, referral, or partnership agreements
- ☐ Past performance, client references, evaluation summaries, or testimonials with permission
- ☐ Organizational chart and staff / contractor role descriptions
- ☐ Data management, confidentiality, accessibility, nondiscrimination, insurance, and risk documents as required
- ☐ Indirect cost documentation or cost-allocation method, if applicable

Submission file naming convention:
[FUNDER_PROJECT_ORGANIZATION_DOCUMENTNAME_DATE_VERSION]

13. Expert Proposal Review Scorecard

TEMPLATE INSTRUCTION: *Use this internal scorecard before submission. The weights are a planning aid only; replace them with the funder's published scoring criteria whenever available.*

Review Criterion	Weight	Internal Score	Evidence / Revision Needed
Eligibility and compliance	10	__/10	INSERT
Alignment with funder priorities	15	__/15	INSERT
Statement of need and evidence	15	__/15	INSERT
Project design and feasibility	15	__/15	INSERT
Goals, objectives, and outcomes	10	__/10	INSERT
Evaluation quality	10	__/10	INSERT
Organizational capacity and partnerships	10	__/10	INSERT
Budget reasonableness and narrative alignment	10	__/10	INSERT
Sustainability and scalability	5	__/5	INSERT
TOTAL	100	__/100	Target internal score: [INSERT]

Reviewer 1: _____ **Date:** _____ **Score:** _____

Reviewer 2: _____ **Date:** _____ **Score:** _____

Final authorized review: _____ **Date:** _____

Final quality threshold
Do not submit until every mandatory requirement is satisfied, all numbers reconcile, credentials are verified, attachments are complete, and at least one independent reviewer can explain the project's need, solution, outcomes, and budget after reading the proposal.

Exhibit A. Myers-Briggs Type Indicator Practitioner Certificate

TEMPLATE INSTRUCTION: *Insert a clear, full-page scan or image of the certificate. Confirm that the name, issuing organization, credential title, issue date, expiration or renewal status, and credential number are legible. Redact private numbers only when the funder does not require them.*

INSERT MBTI PRACTITIONER CERTIFICATE HERE

Recommended image quality: 300 dpi or a clear PDF export.
Do not stretch or crop the certificate seal, signature, dates, or credential details.

Credential verification notes: **[ISSUER / DATE / STATUS / URL OR CONTACT IF REQUIRED]**

Exhibit B. Thomas-Kilmann Conflict Mode Instrument Practitioner Certificate

TEMPLATE INSTRUCTION: *Insert a clear, full-page scan or image of the certificate. Use the exact credential title shown on the certificate and verify any licensing, renewal, or instrument-use requirements.*

INSERT TKI PRACTITIONER CERTIFICATE HERE

Recommended image quality: 300 dpi or a clear PDF export.
Confirm the certificate name matches the name used in the proposal and resume.

Credential verification notes: **[ISSUER / DATE / STATUS / URL OR CONTACT IF REQUIRED]**

Exhibit C. Additional Degrees, Certifications, Awards, and Professional Qualifications

TEMPLATE INSTRUCTION: *Insert only documents relevant to the specific grant. Organize them in the same order as the qualifications section and add a one-page credential index if more than five exhibits are included.*

Exhibit	Credential / Evidence	Issuer / Institution	Date / Status	Included
C-1	INSERT DEGREE OR CERTIFICATE	INSERT	INSERT	YES / NO
C-2	INSERT MEDIATION / CONFLICT-RESOLUTION CREDENTIAL	INSERT	INSERT	YES / NO
C-3	INSERT MILITARY INSTRUCTOR / TRAIN-THE-TRAINER EVIDENCE	INSERT	INSERT	YES / NO
C-4	INSERT EDUCATOR / COLLEGE / CORPORATE TRAINING QUALIFICATION	INSERT	INSERT	YES / NO
C-5	INSERT RELEVANT AWARD OR RECOGNITION	INSERT	INSERT	YES / NO
C-6	INSERT RESUME / CV	SELF / CURRENT	INSERT	YES / NO

INSERT C-1 DOCUMENT HERE
(Add or remove pages as needed.)

INSERT C-2 DOCUMENT HERE
(Add or remove pages as needed.)

INSERT C-3 DOCUMENT HERE
(Add or remove pages as needed.)

Exhibit D. Letters of Commitment, Support, and Past Performance

TEMPLATE INSTRUCTION: *Use signed, current letters addressed to the funder when possible. Strong letters state the partner's role, contribution, participant access, data or facility support, commitment period, and why the project is needed. Generic praise is less persuasive.*

Document	Organization / Author	Specific Commitment or Evidence	Status
Letter 1	INSERT	INSERT CASH / IN-KIND / REFERRALS / HOST SITE / DATA	REQUESTED / RECEIVED
Letter 2	INSERT	INSERT	INSERT
Letter 3	INSERT	INSERT	INSERT
Past-performance reference	INSERT CLIENT / CONTRACT / PERIOD	INSERT VERIFIED SCOPE AND RESULT	PERMISSION CONFIRMED
Evaluation or testimonial	INSERT SOURCE	INSERT VERIFIED RESULT / QUOTE LIMIT	PERMISSION CONFIRMED

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