



CONCEPT NOTE TEMPLATE

PHILANTROPIA

Philantropia Inc., an international fundraising consulting firm, helps organizations around the world to more effectively raise funds. Erik Detiger from Philantropia Inc. designed this resource guide. www.Philantropia.org

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Concept note is the shortest expression of a project idea given on paper to a donor. It is generally used to first propose a project to a donor before submitting a full application. Concept notes are typically between one and four pages long and summarize the key points of the proposed project.

CONCEPT NOTE TEMPLATE

Project Summary

The project summary is a fairly straightforward component of the concept note. However, it is important to include the relevant information clearly and succinctly so that donors can easily read and evaluate your project.

- Focus on your project, not your organization
- Include specific and general location
- Copy the language of the donor

Problem Relevance

While the importance of your project may seem obvious to you, this is not always the case for the donor. Fundraisers often get caught up in the details and numbers of their project and forget the overarching reason for why the project to exist.

This section of the concept note does not have to be long. Keep it short, clear and engaging. Even a single well-written sentence that clearly proves the necessity or relevance of your project can place you above your peers in the application process.

Call to Action

The Call to Action is what you want your readers to do after reading your concept note. Convincing your reader to complete this call is the exact point of the concept note. This section should be only one or two sentences long. However, keep in mind that the importance of this section. A concept note cannot be effective if this section is not properly written out.

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Contact Information

This section is fairly straightforward. Most commonly, the contact information of a concept note will contain:

- One personal contact (name and position)
- One personal email
- Phone number and extension to personal contact
- Organization's physical address
- Organization's website

The thing to note and avoid is that some concept notes make the mistake of providing either too few or too many modes of communication. Including too few contact options makes it difficult for donors to contact you. For example, if you only include a telephone number but the donor needs to mail you a letter, then that is a problem. Similarly, if you accidentally mistyped your telephone number and did not provide an alternate form of contact, then the donor will never be able to reach you.