



**TEMPLETON WORLD**  
CHARITY FOUNDATION

## **Proposal Guidance Document**

Global Innovation for Character Development

March 2019

## I. Introduction

- The application may be read by (i) expert reviewers, (ii) Foundation staff and advisors, and (iii) Trustees of the Foundation.
- Many of the requirements are similar to those for other international funding agencies; some are specific to the Templeton foundations and are required by the Charter of the Foundation.
- Character limits stated on the form include spaces. Many of the best proposals achieve clarity and conciseness within considerably less than the character limit.
- All fields need to be filled out unless indicated otherwise.
- Submit applications online at: [https://webportalapp.com/sp/global\\_character\\_2](https://webportalapp.com/sp/global_character_2)
- All applicants, including those who applied to the 2018 Request for Proposals, will be required to create a **username and password** prior to creating an application
- Any inquiries should be directed to **character@templetonworldcharity.org**

## II. Application Form

### Basic Information

- *Project Title:* should be clear, concise, and easily understood by an educated, non-specialist.
- *Implementation Country:* The project must be implemented in a country listed in Appendix 1 of the RFP document
- *Project Director:* provide the name of the Project Director, who has overall intellectual leadership, makes executive decisions for the project as a whole, and is ultimately responsible for the grant.
- *Legal Organization:* Provide the full name of the legal organization
- *Legal Organization Country:* The legal organization must be registered in a country listed in Appendix A of the RFP document
- *Project Start Date and End Date:* Please indicate the anticipated start and end dates for your project. Projects should not exceed **24 months** in duration for **proof of concept** projects and **36 months** for **transition to scale proposals**. Projects should select a start date on or after **May 1, 2020**.
- *Project Type:* Please indicate if this is a Proof of Concept (\$234,000 USD) or Transition to Scale (\$1 million USD) grant application
- *Project Aims:* Please indicate which of the following three categories best describes the project:
  - *Formative Research:* For projects that aim to explore the process of character formation and local conceptualizations of character strengths
  - *Instrument Development:* For projects which aim to create a new tool/scale to measure character strengths, or to adapt and validate an existing tool in a new context
  - *Intervention Development:* For projects aiming to develop and test a novel intervention to promote character strengths

## Summary Information

**Executive Summary** is a brief statement written for educated non-specialists setting out the aim of the project, why the project is needed, project activities, outputs to be produced by the project, and anticipated impact. A research project should also summarize specific hypotheses, arguments, methodology, and relevance to the field. You do not need to include information about the project team or organization in your Executive Summary. We strongly recommend that you write the Executive Summary after you have completed the rest of the proposal. (Limit 2,000 characters)

**Relation to Sir John Templeton's Donor Intent** should explain how the project would advance Sir John Templeton's [philanthropic vision](#), as this is a prerequisite for all grants. Sir John Templeton was interested in concepts that he referred to as "invisible realities", including (but not limited to) such examples as love, infinity, creativity, gratitude, intelligence, and purpose. He established the Foundation to foster rigorous scholarship and broad communications on such diverse topics in order to stimulate humility, curiosity, and enthusiasm for new discoveries. This is reflected in the Foundation's motto: "How little we know, how eager to learn."

Sir John believed that human flourishing results from the active learning and practice of specific character strengths: 'Wherever we find ourselves in life, whatever the circumstances, whatever habits may be influencing our decisions, we can transform each situation into a learning and growing experience. We can determine how to be the masters of our habits so that our habits can be useful servants to us'.<sup>1</sup>

He saw character development as the means by which to deepen knowledge and understanding of the human person, and to enhance human flourishing. Sir John's ultimate objective for character development was to help individuals become more spiritually prosperous; *he wanted people to be transformed* by what he perceived to be spiritual principles, and believed that the products of such spiritual prosperity would be personal, and relational, and lead to social, and economic prosperity. He wrote in the Foreword to *The Templeton Plan*, "It is my vision that more and more people worldwide will lead lives of happiness and usefulness, and prosperity if we work continuously toward spiritual growth and a better understanding of the virtues by which we should govern ourselves."<sup>2</sup> (Limit 2,000 characters).

## Project Description

The project description is perhaps one of the most important parts of your proposal. It should provide a specific, concrete, concise, and detailed plan of all the activities below that are relevant to your project (or any activity not mentioned below). Please define and explain technical terms when they first occur, especially terms which are used with a specific meaning within the proposal. Any graphics/charts may be included as appendices. Please be sure the project description includes the following categories:

- **Background (2000 characters):** Include a description of the context, target audience and rationale for the proposed project.

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<sup>1</sup> J.M. Templeton, *Wisdom from the World's Religions*, 148

<sup>2</sup> J.M. Templeton, *The Templeton Plan*, 11

- *Literature Review (2000 characters)*: The literature review section should situate the proposal within current research on character development and identify how this proposal will build on, broaden or existing current knowledge of character development. It should give necessary background information for aspects of the project in which reviewers may not be experts themselves, and give confidence that the applicants are knowledgeable in the topic areas.
- *Research Question(s) (500 characters)*: Clearly identify the primary research question(s) and related hypotheses.
- *Project Activities (2000 characters)*: Describe the key activities that will be undertaken as part of the project (e.g. curriculum design, landscape analysis, key meetings or events etc)
- *Study Design & Methodology (3500 characters)*: A research project should be described to the normal standard of a national or international funding agency. The research methodology should provide a clear picture of how the project will be conducted, including information on:
  - Overall design/approach
  - Target population
  - Sample size
  - Data collection methods (e.g. questionnaires, interviews, focus groups, observation)
  - Measurement scales
  - Data analysis
  - Dissemination
- *References (2000 characters)*: Please include a reference list

#### **Supporting Documents (upload if required):**

- *Any graphics or illustrations* required to support the proposal
- *Survey instruments* with a sidebar explaining the reason for each question and how each answer will be used in testing the hypotheses of the project
- *Short papers* giving essential background to the project only if they cannot be summarized in the proposal

#### **Budget**

The budget should show a breakdown of the expected expenditures related to the project. Expenditures must be listed in the relevant categories and be accompanied in each case by a brief description of how it relates to the project. **A minimum of 50% of the budget must be spent on personnel or activities in the implementation country or countries.** As such, please be sure to specify where expenditures will take place.

Please narrate the budget in the following format:

###,###: Expense description. (Country of Expenditure)

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Where appropriate, provide formulas for how a particular expense item was calculated, with consideration of any objective benchmarks (e.g., salary scales) for arriving at the budgeted figures. If significant parts of the project will be outsourced, you may be asked to provide copies of relevant quotations for costs. Break down and describe the costs of your project at a level that allows expert reviewers and Trustees to decide whether or not the estimate expenses are both reasonable and necessary for the project.

The budget should be entered in US\$. If you are converting expenses from another currency, please note the conversion rate used in arriving at the US\$ amount entered.

- *Personnel Costs* section should list team members and other known personnel by name where possible. It should also include non-salaried personnel, honoraria, and personnel positions yet to be filled. This section can also include personnel benefits such as expenses associated with employer contributions to medical insurance, retirement or pension plans, and social security payments for the personnel listed above. Personnel named in the budget and receiving more than USD 5,000 or who dedicate more than 10% of their time to the project should also be included in the Team Members section of the Proposal.
- *Operational Research Costs* section should include equipment, data analysis & collection costs, consumables, and other costs related to the operations of the project. This can include the cost of hiring service providers, but not direct salary payments for collaborators or honoraria.
- *Travel and Lodging* sections should include all reasonable and customary air or rail fares and auto allowances and approved overnight accommodations. The Foundation will not pay for first class or business travel. There are two sections for Travel and Lodging: the first is only for people employed by the Legal Organization whilst the second is for everyone else. In section one, **please allocate \$5000 USD for travel by the Project Director to the Foundation's annual grantee meeting (locations for 2020 and 2021 TBC).**

**Note:** The Foundation will not generally fund projects if both: (1) the travel and lodging expenses of persons who are not direct employees of the Legal Organization is greater than 10% of the Total Request Amount from the Foundation (or the total travel and lodging costs, including costs covered by funding from sources, of persons who are not direct employees of the Legal Organization are greater than 10% of the Total Project Cost), **AND** (2) the Foundation is providing funding for more than 25% of the Total Project Cost.

- *Other* section can include Prizes, Awards, Events, Meals, Indirect costs, RFPs or other appropriate costs.
- *Overhead/Indirect Costs* section may include a maximum 15% which can be applied to all direct costs. The Foundation welcomes proposals that request a lower percentage of overhead costs.
- *Additional Funding Provided By or Sought From Other Sources:* Where the project includes funding from other sources please list the names of other sources of funding for this project, the amount provided by each source (US\$), and whether or not each source of additional funding has been secured, and if not what your plans are for securing each source of potential additional funding. If the additional funding is secured and required, please include a statement of support, award letter, or equivalent in the supporting materials.

**There are several instances when additional funding is required:** for example, when a project requires at least 50% of co-funding to be eligible for follow-on or renewal funding from the Foundation or to be compliant with travel and lodging restrictions. Or, if the additional funding is in the form of a financial (not in-kind) contribution from a specific contributor and is the only reasonable

means to complete a specific output listed in the proposal then the Letter of Support from the source of additional funding is also required.

Qualifying sources of additional funding include grants towards this project from other funding agencies, in-kind salary costs for this project from the employers of project personnel, or donated time of project members. The following should not be included as sources of additional funding: funds for purchasing equipment not solely used for the proposed project; funds to cover costs for activities associated with but not specifically a part of the proposed project; donated overheads or “full economic costs” above the Foundation’s limit of 15%; support for activities that will occur before or after the project.

### **Supporting Documents (upload if required):**

- *A Letter of Support specifying additional funding is required if ANY of the following apply:*
  - The additional funding is both secured **and** required by the Foundation policy, such as when a project requires at least 50% of co-funding to be eligible for follow-on or renewal funding or to be compliant with travel and lodging restrictions.
  - It is in the form of a financial (not in-kind) contribution from a specific contributor and is the only reasonable means to complete a specific output listed in the proposal.
  - A letter is otherwise requested by the Foundation program staff.
- *Quotations for substantial outsourced costs* (if requested by the Foundation program staff)

### **Compliance Questions**

Please provide information about the project’s activities and expenditures. Please answer all of the questions in the application form carefully and provide supporting materials where appropriate.

### **III. Outputs Form**

Outputs are important, specific and quantified products or events to be produced from your project’s activities that are (more or less) under direct control of the Project Director and project leaders. Outputs are those products that are necessary for the changes that you intend for your project to make—that is, your project’s Outcomes (see below). Rather than providing a list of every Output, please consolidate similar Outputs into categories (e.g., journal articles; conferences; workshops; books; courses) and list each category as a single output. The list should be concise and clear, thus allowing you and the Foundation to know exactly what products you are committed to producing through your project.

For up to three Outputs, please provide:

- A description of what will be produced (including quantity)
- Target audience
- What will be delivered/reported to The Foundation
- When the output will be delivered

## IV. Outcomes Form

Anticipated Outcomes are the expected changes or impact that you anticipate will result from the project's Outputs following the completion of the project. Some of these changes may manifest themselves before the end of the grant, while others may not be fully achieved until after the end of the project and may depend on factors beyond the project team. Outcomes should define what the success of this project would look like and be grouped according to the ten categories provided below. List and describe the project's Outcomes and identify indicators of change that can be used to assess the extent to which the Outcome has been achieved. The indicators should be specific, objective, identifiable and measurable. Please describe each outcome sufficiently precisely such that in years to come it will be possible to judge whether or not they have been achieved. Avoid vagueness when identifying outcomes.

Please provide:

- The 'category' in which the Outcome should be classified.
- A description of each Outcome and the expected nature of the change on both primary and secondary audiences
- Quantifiable indicators of the Outcomes. For each, please outline the following:
  - Duration: Short term indicators measure changes that occur within the project life cycle, long term indicators measure changes that occur after the completion of the project.
  - Quantity
  - Description
  - Measurement Method / Instrument
  - Completion Date

Outcomes and their respective indicators should be grouped according to the following categories:

- Increases in practice and expression character strengths attributable to the intervention
- Improvements in health, education, economic, social or related outcomes
- Increases in skills and capacity to deliver character development interventions
- Increases in awareness and knowledge of character strengths and/their importance
- Target population directly participating in character development interventions
- General population reached through promotional material/campaigns
- Events and promotional activities to raise awareness of character development
- Changes to/creation of policies, curricula or standards focused on promoting character development
- Organizations, communities or jurisdictions actively implementing character development as part of their core programming post grant funding
- Other

*Examples:*

*Outcome Category: Increases in practice and expression character strengths attributable to the intervention*

*Outcome Description: Increase in children's gratitude*

*Indicator 1: 60 (75%) of children participating in the intervention program demonstrate a marked improvement in gratitude, as measured through change of 3 points or more on the gratitude self-report scale*

*Indicator 2: 50 (60%) of children demonstrate an increase in practice of gratitude*

*in interaction with their peers, as measured through pre-post teacher observation of classroom activities*

*Outcome Category: Changes to/creation of policies, curricula or standards focused on promoting character development*

*Outcome Description: Ministry of Education adopts gratitude curriculum for grade 5 students*

*Indicator 1: Ministry of Education allocates 5% of budget to implementation of Grade 5 Gratitude curriculum in all public schools by 2025, as measured by changes in public sector spending*

*Indicator 2: All 1000 public school teachers participate in gratitude curriculum training by 2025*

Please Note: Outputs represent the items that will be delivered to the Foundation if the application is approved, while Outcomes are the short-term and long-term effects that are expected to come about as a result of the Outputs. The Foundation is also enthusiastic about the dissemination of scholarly research in ways that impact secondary audiences, downstream from the primary audience in whom the impact of the Outputs are more direct.

If a project is funded, you should be prepared to report on the progress you have made towards the Outcomes; as such, please list only the most important indicators that you can track and report to the Foundation throughout the project.

## **V. Organizations Form**

Please provide information about the main organization through which the project will be run (the legal organization) and any additional organizations which are a sub-grantee or sub-contractor that will receive a significant amount of money and deemed to be crucial to the project. Only one legal organization can be named and to qualify for this RFP the legal organization must be registered in a country listed in the Global Innovations for Character Development RFP (Appendix 1). Please answer all of the questions carefully and provide supporting materials where appropriate.

### **Supporting Documents (upload as required)**

- *A Letter of Support from an additional organization (if requested by TWCF program staff)*

## **VI. Team Members Form**

*Project Director (PD)* is responsible for managing the project as a whole, and serve as the ultimate authority on all matters internal to the project. We strongly encourage applicants to include only a single Project Director, but allow up to one additional person to serve as *Project Co-Director (PCD)* where there is strong specific case. In such cases, the Project Director and his or her Co-Director share executive authority over the project. A Project Co-Director who is outside the Project Director's institution must indicate his or her institution and provide a statement of commitment from their institution. Please note that a Project Co-Director does not need to be affiliated with an organization in an eligible country.

*Other filled roles:* In addition to the Project Director and the Project Co-Director, include any filled roles in which a person will dedicate more than 10% of their time to the project or are named in the budget and are receiving more than USD 5,000 from the Foundation (for example, leaders of subprojects, post doctoral researchers, graduate students, research assistants, etc).

*Positions to be filled:* Include any unfilled roles in which a person will dedicate more than 10% of their time to the project. In each case specify how they will be appointed.

All applications must also include one (and only one) *Contract Signatory*, who works for the Legal Organization. All applications must include (at least) one entry for *Board Members, Trustees, or Regents*.

The percentage of time committed to the project for any individual should be given as an average over the duration of the project.

#### **Supporting Documents (upload as required)**

- A 2 page *Curriculum Vitae* (qualifications, appointments, and up to 10 significant publications relevant to the project) for each named personnel
- A *Letter of Support* is required from a known personnel if ANY of the following apply:
  - The known personnel is a Project Co-Director, a subproject leader, or dedicating more than 10% of their time to the project or are named in the budget and are receiving more than USD 5,000 from the Foundation, and they are NOT employed under the Project Director, Project Co-Director, subproject leader, subcontractor (such as an external service provider) or by a subgrantee.
  - A letter is otherwise requested by the Foundation program staff.

**Please note that shortlisted applicants will be asked to submit documentation to satisfy the Foundation's policy for financial and legal compliance. These materials will be requested by November 1, 2019.**