

# Proposal Writing 101: Essential tools for presenting your funding request

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# The Essential Components of a Grant Proposal Package



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# Elements of Your Proposal

- Cover Letter
- Executive Summary
- Statement of Need
- Organizational Information
- Goals and Objectives
- Methods, Strategies, or Program Design
- Evaluation
- Other Funding or Sustainability
- Project Budget
- Attachments

# Cover Letter

- Usually written last
- Take it seriously
  - It gives an important first impression



# Executive Summary

- Brief overview of the proposal
  - Usually no longer than one page, often less.
- Helps give the funder a quick glance of what you are proposing to do.
- Give pertinent information
  - How many clients will be served?
  - What will they experience?
  - How will the program impact them?
  - How much funding are you requesting?
  - Time period for the project?

# Statement of Need

- This is the section where you explain how you know this is an important need.
- Use community data and research whether the service is already being provided by other organizations.
- Assume that the reader knows nothing about the issue.

# Organizational Information

- Always include:
  - History and mission of your organization
  - Population it serves
  - Current Programs & community collaborations
  - Why is your agency the best suited to provide the proposed project or program?

# Goals and Objectives

- What outcomes do you expect?
- What process will be completed to achieve these outcomes?
- Break down into measurable statements.
- Be sure you have reasonable confidence that your process and your outcomes are achievable and that you will be able to document the results

# Methods, Strategies, or Program Design

- Explain the strategies you will use to accomplish your goals and objectives
- This is where you talk about the details of your project.
  - Who?
  - What?
  - When?
  - Where?
  - How?
- You may be required to provide a logic model in this section.

# Evaluation

- How will you assess your program's accomplishments?
- Data, Data, Data, but keep it simple
  - Use existing data such as school records (grades, discipline referrals, attendance), and/or
  - Use assessment tools such as
    - Pre-tests
    - Post-tests
    - Surveys
    - Focus groups
    - Staff observation to collect your own data
- Give specifics to the funder so they know their resources went to good use and that the program works.

# Other Funding or Sustainability

- How will you continue this program when the funder discontinues providing resources?
- Do you have other funders in mind who are likely to pick up some costs once the program has become a “known entity”?
- Will the program eventually be able to generate revenue?

# Project Budget

- **NOTE:**
  - It is important that the budget is in sync with the project description
  - Don't forget to include your indirect expenses



# Common Attachments

- Tax Exempt Letter
- Board of Directors List
- Form 990
- Audit
- Key Staff Resumes
- Only submit items that are requested

# How to Use the Proposal Process as Stewardship Tool

Stephanie Heishman

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Society for Science & the Public



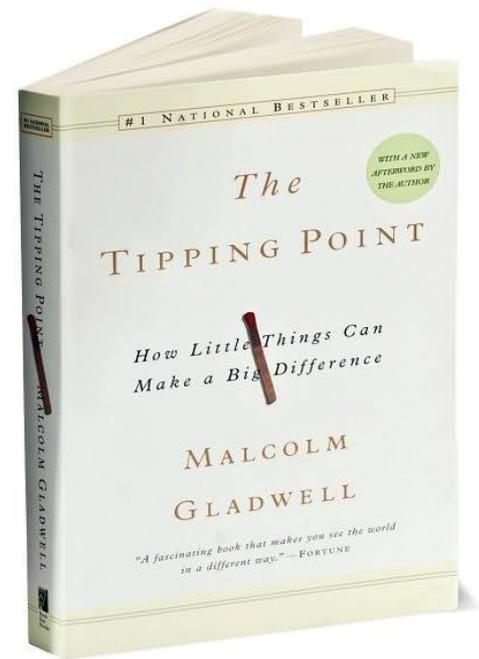
## Do Your Research

- Review 990
  - Who they fund and at what amount?
- Visit their website (if they have one)
  - Review their mission statement and priorities
- Check out press releases and any recent news
- Identify appropriate Program Officer to reach out to

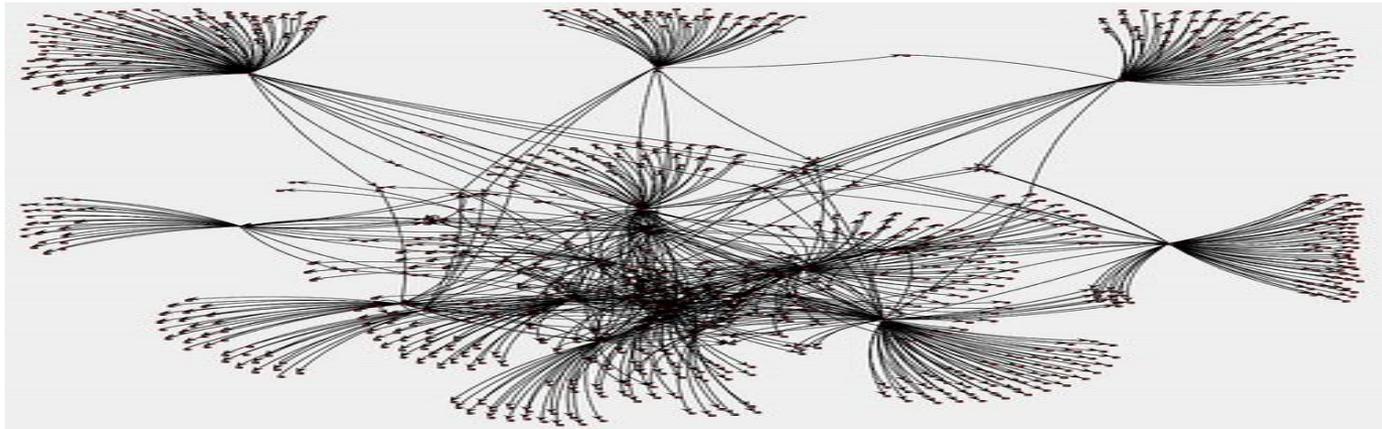
# Identify Your “Connectors”

Consider Malcom Gladwell’s definition of “Connectors” in his book, *The Tipping Point*

**“What makes someone a Connector? The first--and most obvious--criterion is that Connectors know lots of people. They are the kinds of people who know everyone. All of us know someone like this. But I don't think that we spend a lot of time thinking about the importance of these kinds of people. I'm not even sure that most of us really believe that the kind of person who knows everyone really knows everyone. But they do.”**



# Build Your Web



- Board Members
- Volunteers and Friends
- Donors who are local to where Foundation is geographically located
- Review Foundation's own Board of Directors

# Unsolicited Proposals... now what?

- Make sure your program is the right fit
- Send a short, direct email to appropriate program officer asking for more information about their policy
- Try to get an introduction through a contact or an identified “Connector”

# Phone or Email?

**Determine carefully if calling is the best approach.**

**Or, decide if reaching out via email makes most sense.**



# Sample “reach out” email

**From:** Stephanie Heishman [<mailto:sheishman@societyforscience.org>]

**Sent:** Tuesday, October 25, 2011 6:42 PM

**To:** XXX

**Cc:** XXX, XXX, XXX

**Subject:** XX Company and Society for Science & the Public **partnership opportunity**

Dear Ms. XXX,

**I'm contacting you at the suggestion of XXX** (XXX Foundation) to gage [Company]'s interest in public education outreach and award sponsor opportunities for Society for Science & the [Intel International Science and Engineering Fair \(ISEF\)](#) that will be held in Pittsburgh this upcoming May 13-17, 2012 at the David L. Lawrence Convention Center.

**XXX suggested that we get in touch to explore partnership opportunities** that would specifically impact local underserved schoolchildren and their teachers—to get them to the fair to interact and participate in hands-on science activities.

I welcome the opportunity to connect with you or one of your colleagues sometime next week to discuss this further.

Thank you for your time and consideration.

Best Regards,

Stephanie

## Key Verbiage: Be Concise. Not Desperate.

- “Partnership” in Subject Line
- “At the suggestion of”
- “Opportunity to connect with you, or one of your colleagues” (give them an out)
- Specify dates when possible
- Identify partnership need
- Use #s and links in emails- give enough information but not too much
- Don’t list \$\$ amount
- Invite them to have a conversation over the phone and suggest a time

# Stewardship During the Proposal Process: Follow Up, Follow Up, Follow Up

- Never miss an opportunity to give a “quick update”
- Send “Keep in Touch” emails when appropriate, especially if:
  - Proposal has no set deadlines
  - Your org just got great press - “didn’t want you to miss this news”
  - If you’ve learned something in a conversation—i.e. birthday, holiday etc. send a personal **handwritten** note

# Effective Stewardship Example

Stephanie:

Thank you for the update.

I hope you have a wonderful holiday season.

Chris

From: "Stephanie Heishman" <[sheishman@societyforscience.org](mailto:sheishman@societyforscience.org)>  
To: XXX  
Date: 12/21/2011 12:07 PM  
Subject: RE: XXX Charitable Foundation

Hi Chris,

I wanted to follow up with you and let you know we're working on the grant application and should have it to you by mid January, 2012 or earlier.

Also, I know we discussed volunteer and judging opportunities that you were going to pass along to your staff. Attached is a flyer for you to share with your colleagues. This would be a great opportunity for XXX scientists. If you need me to draft an email with this information just let me know-thank you!

I hope you have a wonderful holiday and stay warm!

Best Regards,

Stephanie

# Once Check is Received

- Email program officer to let them know you received check, wire transfer, etc.
- Thank them promptly- formally
- Keep in touch throughout the year about important program milestones
- Report

# Making Your Proposals Stand Out

Fernando Ascencio

Development Manager, Proposals & Grants

ZERO TO THREE: National Center for  
Infants, Toddlers, and Families

# Analyze Your Audience

- You are writing to a Grant Reviewer!
- A Grant Reviewer is not:
  - An assumable expert in your field (even if in theory they should be);
    - Avoid Jargon!
  - A given post-doctoral English expert;
    - Avoid complicated language, if simpler language will do.
  - As passionate as you think they might be;
    - Be succinct and use pictures.
  - Your visionary;
    - Say it bluntly, even if it seems unbelievably obvious.
  - Looking to read the next great American novel.
    - Assume your work will be skimmed.

# Avoid Jargon!

- Every field makes up words – Avoid!
  - Here's your rule -- If you have to explain it, it's probably not a good word.
  - You don't have to make up words to be precise.
- Eight Grader Rule
  - Here's your rule – If you have to explain it, it's probably not a good word.

# There is No Law That Says You Have to Use Big Words

- Use simple language.
  - If a smaller word works, use it.
  - If you have to read it twice, so will the reviewer.
  - Show love to your adverbs and adjectives
    - “Santa Claus delivered the gifts with precision and in a fast turnaround.” -> “Santa Claus quickly and precisely delivered the gifts.”
    - “The Grinch that was mean took all the gifts.” -> “The mean Grinch took all the gifts.”
- Avoid words with no meaning.
  - “Special”

# Examples

- Accompany -> Go with
- Commence -> Start, Begin
- Component -> Place, Piece
- Comprises -> Includes, Forms
- Aircraft -> Plane
- Allocate -> Give, Divide
- Advantageous -> Helpful
- Due to the Fact -> Since
- In Lieu of -> Instead
- Inception -> Start
- Parameters -> Limits
- Validate -> Confirm
- Identical -> Same
- In a Timely Manner -> Prompt
- Consolidate -> Combine
- Magnitude -> Size
- Methodology -> Method
- Necessitate -> Need
- Expiration -> End
- The Month of -> (Omit)
- Promulgate -> Publish, Issue
- Relocate -> Move
- Perform -> Do
- Identical -> Same

# Be Succinct & Use Pictures

- If this was you, what would you want?



# Say it Bluntly & Say it Again.

- Don't skirt around what you want to say.
- Be okay with repeating yourself.
  - They will do this to you...
  - “The second hump of the camel.”
- Use their format and template.
  - Make the reviewer's life easier.

# Your Work Will Be Skimmed

- Say it first, then describe it
  - Inverted Pyramid
- If you want them to know -- Point it Out
  - Use text formatting and color
- Use words that stand out
  - You, Help, Thank You, Partner, etc..
  - Alliteration

# Guide the Reader...

- **USE SIGNAL WORDS**
  - **Contrast**
    - But, Yet, However, Instead, Contrary, Nor,...
  - **Time**
    - Immediately, Presently, Meanwhile, Next,...
  - **Relate Thoughts**
    - Indeed, Anyway, Anyhow, Elsewhere,...
  - **Compare Ideas**
    - Like, Just as, Similar, This,...
  - **Add Ideas**
    - First, Second, Next, Last, Additionally, Also,...

# Don't Change Verbs Into Nouns

- I repeat, don't change verbs into nouns!
  - -ion, (e.g. conversation)
  - -ment, (e.g. requirement)
  - -ism, (e.g. sexism)
  - -or, (e.g. conqueror)
  - -ology, (e.g. symbology)
- Examples
  - “The requirement of the department” vs. “The department requires”
  - “We will work on the establishment of” vs. “We will establish”
  - “We had a conversation with the group” vs. “We conversed with the group”

# Avoid Chains of Nouns

- I repeat – Avoid Chains of Nouns!
  - World Populations
  - Development Officer
  - Drug Discount Program
  - Baseball Game Price Increase
  - Compulsory Motor Vehicle Liability Security Law

# Colors & Formatting

- **COLORS** can be helpful
  - But, don't go crazy -> they can be incredibly distracting if overused.
    - Not to mention -> Hard to Read.
- **Bulleting / Numbering**
  - Great tools -> But, don't rely on this to make your entire proposal.
- **Bolding, Underlining, Italics, All CAPS**
  - Great tools -> Use incredibly sparingly.

# Resources



# Blogs, Books, Helpful Websites

- *The Tipping Point*, Malcom Gladwell
- The Foundation Center, [www.fdncenter.org](http://www.fdncenter.org)
  - Philanthropy News Digest,  
<http://foundationcenter.org/pnd/>
- “The Agitator” blog, [www.theagitator.net](http://www.theagitator.net)
- Chronicle of Philanthropy,  
[www.philanthropy.com](http://www.philanthropy.com)

# Writing Resources

- Strunk, William. *Elements of Style*. Ithaca, N.Y.: Priv. print. [Geneva, N.Y.: Press of W.P. Humphrey], 1918; Bartleby.com, 1999. [www.bartleby.com/141/](http://www.bartleby.com/141/). [Date of Printout].
- Dictionary.com; Thesaurus.com; Reference.com
- PlainLanguage.gov

# Questions?

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