

## **PROPOSAL WRITING SEMINAR: Customizing Your Proposal or Letter of Inquiry (LOI)**

### ***How to Use Your Writing to Connect with Funders, Engage Them with Your Project and Build an Enduring Relationship***

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Too many grant seekers send the same generic LOIs and proposals to funder after funder. Imagine being that funder, deluged with paper and with projects that don't connect with the funder's priorities. A funder wants to find good projects that advance her grant making priorities, but sometimes it's like finding a needle in a haystack.

Sadly, often the applicant organization could have been funded if the writer had taken the extra step to show how the organization (or project) connected with the funder's interests. That's the case with both the LOI and proposal. (The LOI is simply less fleshed out with detail on the project. For simplicity's sake below, I'll use "proposal" to refer to both.)

It's hardly worth the time (yours or the program officer's) when grant seekers toss generic proposals out into the funding sphere, hoping they fall on fertile ground. It's far wiser to send *fewer but customized* proposals to *well-selected* (well-researched) funding prospects. You're a matchmaker, not a dart-thrower. Your aim is to forge a partnership between two sets of people—your group and the funder group—who have similar goals and whose resources can complement each other. You (your organization or project) have the people and skills to implement the project, but you lack the financial resources; the funder, interested in that same kind of work, has financial resources but not on-the-ground people power to carry it out.

If you take the time to customize your proposal to a particular funder as described below, you will immediately stand out from the pack. *It's your job* to show how your project or organization connects with the funder's interests, how your project makes a genuine impact within those interests, and how supporting your organization would enable the funder to help make that impact.

Creating customized proposals that make these connections takes time. Below are some tricks to "systematize your customization" if you're developing a lot of proposals; a way of thinking that can help you customize; and a sample step-by-step framework.

### **The Most Efficient Process for Creating a Lot of Customized Proposals**

- Think about the nature of your project: its characteristics, the different groups it benefits, and mostly the "so what" of it: how and why it matters in the world (its impact). Jot down some notes on these points.

- Research funders to find those who are interested in these issues and impacts.
  - The best future funders, of course, are your organization’s existing or past funders.
  - The Foundation Center’s “Foundation Finder” database can help you find new prospects. Always go to the foundation’s own website for much more current information, and study it well.
- Prioritize prospects by their potential for you: whether there’s a past relationship with your organization, if you or your organization has personal contacts with them, if your interests are truly similar (and if how you approach those interests is similar), if they’re local, or other reasons why you connect.
- You might be able to group prospects into categories: e.g., if your organization provides job training to low-income women, you’ll isolate some funders that focus on women’s issues, other funders than address economic empowerment or job training for low-income communities, yet others that focus on your particular locality, etc.
- Take your very best funder prospect and write a proposal tailored to it. (More on that below.)
- Take that same proposal and then reshape it—customize it—for a different prospect (also see the suggestions below). Often the “body” of the proposal—the detailed project description, timeline, personnel, evaluation, etc.—can remain mostly the same across proposals, with only “the top” (the opening) customized to connect with the particular funder.
- Do it again for another good prospect.
- By now you may see that you’re creating proposals that address the different “categories of customization”: E.g., the proposal you’ve created for a funder concerned with women’s issues can pretty much be used—with minor customization at the top and a quick review of the rest to highlight or de-emphasize any special points—for other prospects focused on women’s issues.

### **The Key to Making a Connection: Flip Your Perspective**

- The principle behind any effective communication or negotiation is to step out of your own skin, see things from the perspective of the other person, and frame your argument from that perspective. Think about the reader/listener—in this case, the program officer or donor. What does he care about? What are his needs, goals and situation?
- While *you* might tend to focus on your project’s or organization’s operations, details, or needs—that’s your primary experience of it—the reader isn’t yet there with you. The person reading your proposal first wants to know (1) Why is this person writing me? Then, (2) What is this communication *about*? Why does it matter for me? Why should I keep reading? Can I make a positive difference (in terms of my funding passions) by engaging with this organization and/or project? And finally, if so, (3) How specifically would it be possible me to help—since it’s my job, after all, to make grants?

- Think about what else would help the funder in considering your proposal. She needs you to be concise (remember that giant pile of paper). She wants you to get to the point.
- A few considerations, then, for your writing:
  - Give your best stuff first. An LOI or proposal is not a place for suspense. It's not a mystery novel. You don't want to wait til the very end to get to the point: Quite the opposite. Give the best statement of your cause, your program description, your specific "ask," and the potential impact of the grant at the beginning. (Sometimes you'll find that as you draft your proposal, you finally state things really well at the end, when you write your way into clearly expressing the "so what." Then you can move that powerful language from the "conclusion" up to the top.)
  - Connect right away. The concise statement of your cause, program, "ask" and impact—the opening of your proposal—is the most important place to customize. *It should be different for every potential funder.* They're unique; how do you connect?
- Put yourself in the funder's shoes in other ways, too. If you were giving away your money, what would you want to know? Other issues she'll need addressed at some point in your proposal include these: She only has limited funds, so is your project the best use of them? (Show how it is; she'll then be able to use that argument with her board.) Would it really make the impact you're saying it will? (Show how you'll do it; show that you recognize obstacles and have a plan for dealing with them; get specific, if possible, about the expected impact and why you believe you can expect it; describe how you evaluate such work.) Would your organization use the money well? (Mention other grants if you have them; give bios of your staff or board that demonstrate expertise and accountability.) Who else is doing work like that, and how are you different or complementary? How much money do you need to make the impact? (Show that you've thought that through by providing an accurate, thoughtful budget.)

## **A Basic Structure for Customizing Your LOI or Proposal**

### First Paragraph of LOI or Short Proposal (Under 3 Pages, Say):

1. Start by stating any connection and why you're writing.
  - If you have a personal connection to the funder, or if your organization has a history there, start by mentioning it. Give a context. E.g.: "Joe Boardman [if you need to identify Joe, do so here] suggested that I contact you," if Joe's name means something to that funder. Or, "The ABC Foundation [the one you're applying to] has supported the XYZ Nonprofit for seven years and has made a significant impact in [doing what]. I'm writing today to ask if you might consider a special, one-time gift that would leverage this past support"—or whatever it is you're asking. (NOTE that if you're not sending an LOI but a short proposal with a cover letter, you might mention

the personal connection in the letter instead of the opening of the proposal. Then in the proposal you can jump right into the project-related connection.)

- If you don't have a personal connection or history, you have an opportunity right now to build a relationship. Demonstrate that you know what the funder does, and present your organization/project as aligned with it.
    - For instance, a grantwriter trying to raise money for a media project on hunger issues wrote the following (a simplified example) to a funder that cares about agriculture: "I'm writing to explore the possibility of support for a project that can bring wide public attention to agriculture issues." In this case, the project involved media, which isn't something the foundation regularly does; thus we didn't mention media in that first sentence. However, we *would* mention it in the next couple of sentences—but after a connection has been made overtly with the funder's primary interest, to show the alliance of purpose.
    - This same project also addressed food challenges facing indigenous peoples. Thus we identified funders concerned with indigenous groups. We might start, "I'm writing to explore the possibility of support for a project that can draw wide public attention to the growing problem of hunger among indigenous people displaced by...."
    - Funders are usually very sophisticated about the issues they support. You need to craft your initial sentence astutely, with awareness of the nuances of the issue.
    - Your presentation of your work also must be accurate. You don't want funding for something other than what you're genuinely doing, and you should not misrepresent yourself. At the same time, draw out what you have in common. It might only be one aspect of what you do; but that's what the funder could support.
  - Don't be afraid to be direct, even prosaic, in opening the letter with something as bland as "I'm writing to...." Sometimes grant writers try to craft artful sentences that avoid the actual reason they're writing, which is to ask for consideration for funding. The reason you're writing is to ask about possible funding. The reason they're reading is to consider giving funding. There's no need to beat around the bush.
2. Now (same paragraph in which you make the connection) describe the project or organization very concisely—in a sentence or two—and ideally in terms of the "so what" behind your project. What are you doing, and why does it matter? Here you can use powerful and even emotional (though not hyperbolic) language. If you're chosen your potential funder prospect well, they will share this passion, or at least an aspect of it; that's what you highlight. Be sincere. To get at this sincerity, ask yourself personally and silently why you're doing this work, really. Why does it matter to you, to the people benefiting from the work, and to the funder? Capture that shared potential meaning in these couple of sentences. You might choose to put a statistic in here to elaborate the situation, but keep it brief. You're still in the first paragraph or so; don't overload it. You have the rest of the proposal to give background info. This is your summary statement that draws on your strongest point.

3. Now take the logical step of telling the funder, who should be intrigued by now, how he or she could help. *Make the ask*. Many writers are afraid to ask for a grant at all, much less a specific amount. But the funder needs to know what you're asking for. That helps her place your request within context. You should make this request reasonable in accordance with the funder's typical grant range. "We are seeking a grant in the range of xx, which would enable us to..." And then use powerful (though again, accurate) language to express the impact that grant would make.

#### For Longer Proposals:

- You can take a few paragraphs to cover the points above. Think in terms of an Executive Summary: Start with the "so what" (a concern that should be shared by you and the funder) and briefly, if needed, give context—perhaps additional reasons why the project is urgent. Then tell briefly what the project is. Describe what you intend to do. Describe why it hasn't been done elsewhere or would make a difference. Explain what you need and what the potential grant would do. Get to "the ask" at the end of this opening section. Ideally this overview is contained on a page or less so the reader can see "the ask" on this first page.
- This kind of summary can be helpful for the program officer because if he's interested in the project, he'll later have to write up a concise summary of it to share with colleagues or the board. You're making his job easier.

#### After the LOI's Opening Paragraphs or Overview/Executive Summary in a Proposal:

Now that the reader knows why you're writing and what the basic gist is—now that he's oriented—you can go into all the detail you need. You can give background, need, program description, timeline, staff bios, budget, etc.—whatever else you're including. In a proposal, use subsections (boldface or underline headings, etc.) to set off this information from the introduction. (In an LOI, you'll use less detail.)

Address the funder's concerns as expressed in grant guidelines. You might also address:

- How your project will make excellent use the funds;
- How these funds will enable you to make the impact you promise;
- How you'll evaluate the project and the use of the funds, and how you'll communicate that to the funder;
- What challenges you might expect (if so) and how you'll cope with them;
- What's your track record in using other grants;
- What are your staff and board qualifications (the funder is entrusting money to them);
- What partners, if any, you work with, and how and why;
- What expenses are essential for making the impact (your budget) and the reason why (your budget justification).

If your organization will contribute its own resources in some way (money, staff, volunteers, etc.), state that, giving specifics if possible, so the funder knows this project matters to the organization, too, and that others are contributing as well.