

## Step 10

# Writing the Proposal Summary

**YOUR PROPOSAL IS** now complete—well, almost! The proposal summary does what its title suggests; it literally summarizes the entire proposal, which is no easy feat. In this step you will learn the basics of constructing a solid and, it is to be hoped, compelling summary. Using a worksheet and following examples, you will also write a summary for your own proposal.

### Purpose and Content of the Summary

When you want to know what a novel is all about, what do you do? You flip to the back or inside cover, and you read the two- to three-paragraph book summary, which either motivates you to want to read the book or signals that the book probably holds no interest for you. Well, the same premise holds true for grant proposals. A proposal summary—also referred to as an executive summary—is a sneak peek at what your proposal is all about. That means it needs to be good in order to stimulate the program officer's interest in your project.

All proposals of more than five pages in length should contain a summary, and in most cases funders make a summary a required component of the proposal. The summary is a clear, one- to two-page abstract of the proposal. Positioned at the very beginning, it is typically the section written last to make sure that it incorporates all elements of the completed proposal. A proposal summary should contain the following elements:

- Identification of the applicant (your organization)
- The specific purpose of the grant
- The applicant's qualifications to carry out this purpose (the program)
- The anticipated end result
- The total program or project budget and how much the applicant is requesting from the grantmaker to be used toward that amount

Keeping in mind that on average, summaries are succinct (again, one to two pages maximum), you should include each of these elements in one short paragraph—or less, if possible. It is customary to follow the order just given when writing your summary.

A crisp and well-articulated summary helps the reviewer understand the need for the program and the results expected. It paints a picture of the full proposal and entices the reviewer to read more. A poorly written summary will leave the reviewer asking why the program is important, which will hurt its chances of being funded by that foundation or corporation—in fact, it hurts the proposal's chances of even being read. Always keep in mind that program officers have dozens—and in many cases hundreds—of grant proposals to review during a given funding cycle. Do not give them any reason to set your proposal aside.

Writers employ different approaches to the summary. Some will start with the compelling need the program is addressing, whereas others will start by introducing their organization, its reputation and standing, and its overall qualifications. When in doubt, consider following the same order used in your proposal.

If you find that you struggle with writing the proposal summary, know that you are in good company. Even the most seasoned grantwriters sometimes struggle with this section because it demands brevity. It requires the writer to capture the most essential elements of each component of the proposal, in a condensed style—yet in a way that will capture the reader's attention and distinguish this proposal from the pack.

## Tips for Writing the Summary

- Decide what the key points are in each section of the proposal you have been writing throughout this workbook. Include only those key points in the summary.
- Stress the key points that you know are important to the funder. Make sure the summary highlights the potential grantmaker's priorities.

Study the following Sample Summary for the Senior Latino Community Outreach Pilot Project. Then complete Worksheet 10.1A to pull together the material for your summary, using the example in Worksheet 10.1B as a guide. Next, write the summary for your own proposal, consulting the senior center Sample Summary once again. Finally, review your work by asking the Summary Review Questions. You should be able to answer yes to each question.

## Sample Summary

The Some City Senior Center was established as a 501(c)(3) organization in 1994 by a group of six seniors ages 60 to 82 who wanted to create a place with activities and support services that would cater to the specific needs of seniors. The Center addresses the health, social, recreational, and logistical needs of the elderly population in four cities. We are the largest senior center in Any County and serve more than 450 older adults each day through a wide variety of programs. Our mission is to help seniors improve and maintain a healthy and independent lifestyle and to maximize their quality of life.

We are conscious of the changing demographics in our center's service area and are committed to growing and adapting our center to meet the emerging needs. The Senior Latino Community Outreach Pilot Project will provide comprehensive access to health and social services to the seniors in the Latino communities served by our center. Program objectives include ensuring that a minimum of 75 Spanish-speaking seniors with Type II diabetes maintain stabilized blood sugar levels for three consecutive months; increasing by 50% the number of monolingual Spanish-speaking seniors who access the services of our center for the first time within the grant period; engaging a minimum of 50 Latino seniors in our new healthy Mexican food cooking class; and increasing our referrals of Latino seniors from the community clinics and partnering nonprofit organizations specifically serving the Latino community by 50% within the grant period. After the pilot phase of the program has been completed, we are committed to phasing in access to our center's other programs.

The Center plays a vital role in the lives of seniors in Some City, Valley Vista, Grove Beach, and Hill Viejo as evidenced by our 92% approval rating from our clients in 2007. These four cities account for 39.8% of Any County's total senior population (which is 15.2% of the county's total population). Our four-city service area has a rapidly growing older adult population, which has nearly doubled since 2000 and is expected to double again over the next two decades. Nearly 50% of our seniors are living below the federal poverty line, and it is estimated that cumulatively, Latino seniors—both bilingual and monolingual—make up an ever-growing segment of total senior population in our service area.

We believe that this project will introduce our center and services to an extremely underserved senior population. As a result, we anticipate a rise in Type II diabetes self-management, fewer seniors who have no medical home, increased diversity among our clients to reflect the changing demographics of the cities we serve, and improved quality of life for those clients.

The total cost of implementation of our Senior Latino Community Outreach Pilot Project is \$190,000. Of this amount, \$140,000 has already been committed from both county and city governments and other funders. Your investment of \$50,000 will complete the funding we need to fully implement this pilot project, and we are excited about the prospect of partnering with you. Thank you for your consideration of our request.

## Helpful Hint

*Be consistent.* Now is not the time to introduce new information. Everything in this section should already be part of your full proposal.



## WORKSHEET 10.1A: Summary Questionnaire

Worksheet 10.1B contains sample answers to these questions. Please use it as an example as you complete this questionnaire.

1. What is the identity of your organization, and what is its mission?
2. What is the proposed program or project (title, purpose, target population)?
3. Why is the proposed program or project important?
4. What will be accomplished by this program or project during the time period of the grant?
5. Why should your organization do the program or project (credibility statement)?
6. How much will the program or project cost during the grant time period? How much is being requested from this funder?

## WORKSHEET 10.1B: Summary Questionnaire Example

1. What is the identity of your organization, and what is its mission?

*The Some City Senior Center was established in 1994. We are the largest senior center in Any County. Our center's mission is to help seniors improve and maintain a healthy and independent lifestyle and to maximize their quality of life.*

2. What is the proposed program or project (title, purpose, target population)?

*Senior Latino Community Outreach Pilot Project. This project is our first major outreach effort to serve the Latino community of elders—both Spanish and English speaking—with health and social services. We will focus on the seniors living in our service area of Some City, Valley Vista, Grove Beach, and Hill Viejo.*

3. Why is the proposed program or project important?

*Because this growing segment of the senior population in Any County is being ignored. In Any County, 37% of Spanish-speaking adults reported income below the federal poverty level. In Valley Vista alone, the population is approximately 70% Latino, and of that Latino group, over 50% are monolingual Spanish speaking.*

4. What will be accomplished by this program or project during the time period of the grant?

*The Senior Latino Community Outreach Pilot Project has four goals: (1) increase by 50% the number of monolingual Spanish-speaking seniors who access our services for the first time, (2) engage a minimum of 50 Latino seniors in our new Mexican food healthy cooking classes, (3) increase referrals of Latino seniors to our center from our partnering agencies by 50%, and (4) to graduate a minimum of 75 monolingual Spanish-speaking seniors from our diabetes Type II self-management class, resulting in stabilized blood sugar levels for these individuals for three consecutive months.*

5. Why should your organization implement the program or project (credibility statement)?

*We are the largest senior center in Any County, and we have a 92% satisfaction rate from our clients. We have served seniors 60 and up since 1994 and now assist over 450 seniors every single day with their health, social, recreational, and emotional needs so that they can maintain a healthy and independent lifestyle and maximize their quality of life.*

6. How much will the program or project cost during the grant time period? How much is being requested from this funder?

*This project has a budget of \$190,000, of which all but \$50,000 has been secured from government, individual, and foundation sources. The request to this funder is for the remaining \$50,000.*

## Summary Review Questions

1. Does the summary clearly identify the applicant(s)?
2. Does it describe the specific need to be addressed and the specific objectives to be achieved?
3. Does it mention the total program or project cost and the amount of funding requested?
4. Is it brief (no more than one page)?
5. Does it thank the funder for considering the applicant's request for funding?

Moving into the home stretch, you are now ready to put the proposal package together—which just happens to be Step Eleven.