# Step 11

# Putting the Package Together

**IN THIS STEP** you will learn the importance of presenting your proposal with a clear but brief cover letter and the attachments that funders may require you to include.

## Purpose and Content of the Cover Letter

Your proposal is complete—you did it! Now you need to package it and send it off to the funder. Sounds simple? Well, not so fast. First, you need to craft a brief, yet informative cover letter that will serve as the first piece of information the program officer reads. This letter should accomplish the following:

- Briefly introduce the organization making the request.
- Highlight the support of the board of directors for the project.
- Specifically mention the financial request—how much and for what.

Make it your goal to keep the cover letter to one page and preferably three to four paragraphs maximum. Remember, you have a full and detailed proposal that you want the program officer to read—don't take up her time with an unnecessarily lengthy cover letter. Start the letter by introducing your organization and informing the funder of the amount and purpose of your request. Use the next paragraph to briefly highlight your proposal and any salient points. The closing paragraph should thank the program officer for his consideration of your request and should also clearly indicate whom to contact in your organization with responses. Typically, the person who signs the cover letter—which should be your organization's executive director, board president, or both—is not the contact person who follows up on the request, so make sure to indicate who the contact person is by name and title and to include that person's direct e-mail address and phone extension. Minimize opportunities for confusion, and make it as easy as possible for the foundation representative to reach the right person in your organization.

This final paragraph is also the place to suggest a meeting or invite a site visit between the prospective funder and the applicant to answer questions

and provide more information. When the contact person from your organization follows up via e-mail or telephone to confirm receipt of the proposal, that's a great time to again offer the option of a meeting. Use the following Sample Cover Letter as an example.

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## Sample Cover Letter

Mary Smith, PhD
Program Officer
Community Foundation
4321 Common Lane
Some City, YZ 55555

Dear Dr. Smith:

The Some City Senior Center is respectfully requesting a grant in the amount of $50,000 for our Senior Latino Community Outreach Pilot Project. As the largest senior center in Any County, serving over 450 seniors every day, we are conscious of the changing demographics in our service area, and are committed to growing and adapting our center to meet emerging needs. The Senior Latino Community Outreach Pilot Project will allow us to pilot a one-year effort to determine if our center can effectively (1) provide comprehensive access to health and social services to seniors in the Latino communities served by our center and (2) raise and fully integrate the cultural competency of the board, staff, and volunteers of the Some City Senior Center.

Our board of directors is enthusiastic about this program and eager to launch it in an effort to be the most inclusive, responsive, and culturally competent center for seniors in all of our communities that need these services. Should we find at the end of our pilot year that this program is in fact successful, our board is committed to integrating a portion of the project's yearly expenses into our annual operating budget so that the program becomes an integral part of our core services.

Through this project, the center will serve as the primary referral given by Health Access Latinos, Families of Any County, and three community clinics within a fifteen-mile radius of our center. We will also take referrals of Spanish-speaking seniors from any other community agency in our immediate service area.

Thank you for your consideration of our request. I will follow up with you in the next week to answer any questions you might have, as well as to learn whether there is a possibility of meeting with you to discuss the merits our proposal. Should you have any questions in the interim, please feel free to contact Connie Jones, our Director of Development, at (555) 555-5555, x555, or cjones@scsc.org.

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Sincerely,
Jane Lovely

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## Purpose and Content of the Appendixes

Appendixes, or attachments, are a necessary and important addition to your grant proposal. They are documents that are not components of the proposal per se yet provide valuable information that the funder will need when considering your request. Most foundation (and government) funders supply a list of their required appendixes, and most corporations do not. When no attachment list is provided, consider including the following documents, unless, of course, the grantmaker specifically says not to:

- Your organization's IRS 501(c)(3) tax-exempt status determination letter or fiscal agent's letter, if there is a sponsor, to establish nonprofit status
- Your organization's most recent audited financial statement
- A list of your organization's board members, their work and school affiliations, and any other applicable information
- Your organization's overall budget for the current fiscal year
- Your organization's latest annual report (if it prepares an annual report)
- A list of all other funders who have received or are receiving proposals for the program, the amounts of these requests, and the current status of each request

In addition to these items, a foundation might request profiles of the key staff members who will be implementing or overseeing the proposed project and a list of current funders. Corporations are typically less likely to want attachments. That said, a copy of your organization's marketing plan and copies of your organization's appearances in the media might be useful to them, as corporations tend to have an interest in receiving public relations exposure for their support. Many foundations—especially those that raise money to fund their grantmaking—increasingly look for information about a nonprofit's marketing and communications capacity, which may influence favorable consideration.

Some funders may also require an attachment section for a letter proposal. Many of the items in the previous list are generally included with these shorter proposals. Letters of intent, however, will most likely require a much reduced appendixes section that includes only the IRS determination letter and possibly a list of members of the board of directors and your organization's budget.

## Packaging the Proposal

A simple, clutter-free, and neatly packaged proposal creates the perception of a well-organized, successful organization. Conversely, an envelope full of unorganized pieces of paper does just the opposite. You get only one chance to make a good first impression!

Give your proposal and all appendixes a good "once over" and make sure that

- They are nicely copied on fresh paper.
- The pages are numbered and appropriately identified.
- The proposal is nicely formatted, with no typos (don't rely on spellcheck but run it anyway).
- The name of the foundation, staff person, and address information are correct (and don't hand address the envelope or label).

- The cover letter is printed on your organization's letterhead.

For good measure, and as a way to double-check your work, consider creating a table of contents for your proposal. You might also provide a numbered list of the appendixes, which can then serve as the page separator between your proposal and the attachments section.

Carefully read the funder's guidelines to confirm the number of copies of the proposal that you should send. It is now common for grantmakers to request an original and several copies of a full proposal, so make sure you follow their instructions. If more than one copy of your proposal is requested, clearly mark which proposal is the original. It is also not uncommon for funders to request both a hard copy and an electronic copy via e-mail.

In an effort to cut down on use of paper products in general, proposals (other than letter proposals with only a few appendixes) should be neatly arranged and held together with a large binder clip, rather than a folder. Start with the full proposal, the budget, and then the appendixes *in the order listed in the guidelines.* Leave the cover letter outside the binder clip for your original proposal only. Each copy of your proposal can be fully binder-clipped, with the cover letter copy inside the clip. You can paperclip each section of your proposal if you like (narrative proposal, budget, appendixes), as that might make accessing the proposal overall easier for the funder.

The dress-to-impress strategy does not work when it comes to your proposal. Placing it in a three-ring notebook, having it spiral-bound, or spending unnecessary funds to have it color copied do not add value. Presentation is important, but only from a neatness and orderliness standpoint. Flashy typically backfires—and it ultimately creates more work for the funder, who certainly will not appreciate it.

Use the checklist in Worksheet 11.1 to make sure your proposal is complete and ready to mail.

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### Reality Check

*Broken-record alert.* It is essential that you follow the funder's guidelines for packaging your proposal, just as with all other parts of the application process. Nearly all funders—foundations, corporations, and government—will say "no staples." Their staff must take the proposals—dozens or hundreds of them each cycle—apart to make multiple copies for board members to review; staples make their jobs much harder. Use staples and you may immediately disqualify your proposal from consideration—it's that cut and dried. Does the funder ask for twelve-point type, a Times Roman font, and one-inch margins on all sides of the paper? Or maybe the funder wants to receive proposals only on recycled paper, not on your stationery. Whatever the funder has taken the time to specifically outline in its guidelines is exactly what you should give the funder. Do not provide any reason for your proposal to be disqualified.

## WORKSHEET 11.1:
## Final Proposal Checklist

Place a checkmark next to each step after it is completed.

_____ Determine which program or project ideas have the best chance of being funded.

_____ Form a planning team that includes clients affected by the program or project, community leaders, key staff and volunteers, and other organizations with similar or complementary projects.

_____ Design a program or project plan.

_____ Conduct thorough research to determine funding sources most likely to be interested in the program or project. Note funder deadlines.

_____ Visit the website of each prospective funder to review its grant guidelines, annual report, grantee list, and so forth. If a funder has no website, e-mail or call to request information helpful in preparing the proposal (annual report, grant guidelines, and so on).

_____ Read all other grantmaker materials (Form 990, media coverage, and so on) to ensure that the proposal falls within the funder's interest areas as demonstrated by previous grants made.

_____ Prepare the proposal core components by stating the need or problem to be addressed, the objectives and the methods for meeting the need, the ways the project will be evaluated and funded in the future, and the budget.

_____ Determine the features of the program or project that may set it apart from other projects and will appeal to the funder.

_____ Make sure those features are highlighted for the grantmaker.

_____ Prepare the final proposal components: the introduction, summary, and cover letter.

_____ Ensure the proposal is clear and well written by having at least one person review it and provide feedback.

_____ Include the appendixes requested by the funder.

_____ Review grant guidelines and confirm the number of proposal copies to be submitted and any specific formatting requests, in order to meet the requirements.

_____ Give copies of the proposal to members of the planning team and other individuals or groups who should be aware of the program or project.

_____ E-mail or call the funder within two weeks after mailing the proposal.

## Sending the Proposal

*Congratulations!* You have "twelve stepped" your way to a solidly developed grant proposal based on the keys to success discussed in this workbook's Introduction. For a proposal to be successful it must reflect the work of a fully developed and articulated program plan—which is 80 percent of the up-front work and is sometimes easily overlooked. Only then is the proposal written (the other 20 percent), clearly and concisely, for a targeted funder who has been thoroughly researched and vetted and with whom a relationship has been established.

Please pay particular attention to the Special Resource Section at the end of this workbook, where you can find out more about how to research funders and learn about their preferences and values. When your organization's proposal has been packaged and mailed out to prospective funders, go through Step Twelve (the next step in this workbook) to review some suggested strategies for maintaining contact with those funders and moving your proposal through their grantmaking process.