MODIFYING PROPOSALS FOR DIFFERENT FUNDERS

INTRODUCTION

Suppose you have spent a great deal of time writing a proposal for a public agency or a foundation. However, you did not get the funding you requested, got partial funding and need to raise more money, or want to expand the project to serve more people. Whatever the reason, you think you have a good, solid proposal, and you want to modify it for use with different funders.

Great idea! However, you need to do this carefully and systematically, so the proposal is attractive to the new funding source. This usually involves two stages:

- **Pre-editing work** such as learning about the new potential funding sources, deciding on format, and reordering information to fit the new format; and

- **Writing and editing,** to create an effective new proposal that sounds as if it was developed specifically for the new funding source.

This little "how-to" guide emphasizes the work required when you are going to revise a public-sector proposal to fit private-sector funding source requirements. However, the process is not terribly different if you are going the opposite direction – from a foundation to a public agency. You will be making the proposal longer rather than shorter, but you will still be learning about funding source interests and requirements and preparing a proposal that meets these requirements while reflecting the work that your organization wants and needs to do.

Following are some hints for completing both pre-editing and writing and editing tasks successfully.

PRE-EDITING WORK

Before you are ready to revise the proposal, you need to do a good deal of preliminary work.

1. **Be sure you understand the interests and priorities of the new funding source.** Identify relevant funding priorities, use the internet or a Foundation Center or other funding guide to understand what similar organizations or projects have received funding, and get familiar with the terminology used by this funder. Find out whether this funding sources makes multi-year grants, and determine typical grant size.

2. **Become familiar with the application requirements of the new funding source, including the narrative proposal format.** Particularly for foundations and corporations,

you may be required to submit a letter of inquiry (see materials in reference manual) before you are permitted to send a full proposal, or a specific format may be required. For example:

- **Public funders:** If you are preparing a new public-sector proposal, then you will need to reformat the application to fit the new funding agency's requirements, generally as specified in the Application Guidance or Request for Proposals (RFP). Most federal, State, city, and county agencies use competitive RFP processes for most of their funding. Sometimes it is possible to submit an unsolicited proposal. If so, they are likely to want the same face sheet and standard budget format as for competitive proposals.

- **National foundations:** Most national foundations do not have specific required proposal formats. You should develop a "standard" format to be used by the agency; be sure you include any specific information specified in the foundation's guidelines. Sometimes, national foundations release RFPs, in which case you respond to them just as you would a public-sector RFP, meeting all format and content requirements. Usually the application package is considerably simpler than a public-sector application, because there are fewer legislative requirements to be met.

- **Local foundations:** An increasing number of local foundations require or prefer a standard proposal format. A number of regional associations of grantmakers (RAGs) have worked with their members to develop and adopt such formats. For example, there is a standard format for New York and New Jersey that is accepted by about 225 foundations and corporate funders in the area. It can be downloaded from the New York Regional Association of Grantmakers (NYRAG) website – www.NYRAG.org – or by calling 212/714-0699. The Washington Regional Association of Grantmakers (WRAG) has a common grant and report format; both can be obtained on www.wrag.org or by calling 202/ 202-939-3440. If no standard format is required, foundations usually want a relatively brief proposal, usually not more than ten pages single-spaced, excluding attachments – and the attachments should be far less extensive than for public-sector proposals.

- **Corporations:** Many corporate funders accept the standard proposal format available from the RAG. Others prefer a very short proposal (3-5 pages) or letter proposal. Consult the corporation's website or obtain guidelines to be sure.

If possible, meet with the potential funding source before you revise the proposal, to develop a relationship and to better understand funding source priorities and interests.

3. **Deal with any identified weaknesses in the project plan or presentation.** Strengthen any vulnerable parts of the project design and presentation before you start modifying the proposal for another funder. If you didn't receive funding from the original targeted funding source, see if you can get a debriefing about the strengths and weaknesses of your proposal. Public-sector funders usually are required to provide such feedback, and often to share your total score on a competitive proposal. Foundation representatives rarely score proposals but do evaluate them and are often willing to share their assessments, especially if you ask specifically and emphasize that you want to improve your proposal.

4. **Recheck original assumptions.** Conditions in a neighborhood can change rapidly. If you are working on an issue like HIV/AIDS, new research or evaluation may become available at any time, providers may come and go, and public awareness changes rapidly. Be sure the assumptions you made in designing the project remain sound.

5. **Decide how much funding you will be requesting from this source, and what that will mean in terms of proposal revision.** If you are planning to request funding from several different foundations or corporations, it is usually no problem to develop a full proposal and then indicate in the Budget and Financial Information section and cover letter that you need $Y to fully implement the program, have raised $X, are requesting $Z from this funding source, and are seeking the rest from several other potential funders. If you want to reduce the scope of the project, then decide what funding level you will aim for, and review the current budget and work plan to see how much of a reduction is involved. If you want to expand the program, decide what additional components or expanded activities you want to include, and their approximate cost.

6. **Review and redraft the budget.** If the proposal is more than six months old or you are in a new fiscal year, you may need to include salary increases, a different fringe benefit percentage or general and administrative/indirect cost rate, higher rent, or other changes. If the project has been partially funded, be sure the budget reflects the needed cost categories. If the funding source has a required budget format, restructure the proposal to fit that. If not, redraft the budget using the line item your agency prefers to use. Don't consider it "final" yet; you will want to review it against the revised proposal.

7. **Update the content of the problem statement.** Be sure the epidemiologic data, client information, and/or community demographics remain the most up-to-date available. Nothing "dates" a proposal faster than old statistics.

8. **Develop a new proposal outline to fit the requirements of the new funding source.** If no required format is specified, use your organization's "standard" proposal format; if a letter proposal is required, outline it (See sample formats included in these reference materials).

9. **Now "match" proposal components and sections; figure out where the needed information for the new outline can be found in the current version of the proposal.** Figure out whether any needed information is missing (sections below with asterisks), or whether existing information simply needs to be rearranged and revised. The box that follows provides an example:

New Proposal	Current Application
[* = some new information required]	
Summary	Abstract
I. Agency Capability	D. Project Management, 4.Capability and Experience
II. Need for the Project	A. Project Description, 3. Unmet Need*
III. Methodology	
A. Goals and Objectives and Project Significance	A. Project Description, 4. Goals and Objectives/Impact
B. Target Population	A. Project Description, 2. Target Population*
C. Components	B. Project Plan
D. Tasks	B. Project Plan
E. Evaluation Plan	C. Evaluation/Methodology
F. Management Plan	D. Project Management, 1. Management Plan, 2. Timelines
IV. Budget and Financial Information	Budget Form and Justification*

10. **Reorder and revise the sections.** Put the "new" proposal in order. Assuming you are using a computer, this is mostly a "cut and paste" job. Once you have done this, and marked areas where additional information is needed, you are ready for the work that focuses on writing.

EDITING AND REVISIONS

Now you are ready to create a "new" proposal. To do this effectively, you must keep in mind what you know about your new funding source. Typically, if you have written a proposal to a foundation or corporation and now want to apply to a public agency, you will be expanding your proposal and fitting it into a new format. If the original proposal was an application to a public agency (federal, state, or local) and you want to revise the proposal to send to a foundation or corporation, you will be shortening the proposal considerably and probably using less technical language.

If you are modifying a public-sector grant application into a proposal for a foundation or corporation:

- **Use terms and detail appropriate for the potential funder – particularly the people who will review your proposal.** Most applications for public funding go to agencies and are read by review panels who are experts in your program area. If it is an HIV/AIDS prevention or care proposal, you can be sure that most of the people who will read it work in the HIV/AIDS or a related field. On the other hand, foundation or corporate staff reading the same type of proposal may or may not be HIV/AIDS specialists. If the funding source does not specialize in HIV/AIDS or do a great deal of funding in your community, assume the readers are intelligent, well educated people with limited knowledge of your community and a general knowledge of your program area. Modify the proposal accordingly! Avoid acronyms and define technical terms.

- **Show that your proposal fits the funder's priorities.** If the funder indicates a commitment to helping to improve the health status of underserved populations, and you are proposing an HIV prevention project for teen mothers or African American youth or recent immigrants, indicate why the project will improve their health status and describe why they are underserved. If the funding source focuses on particular neighborhoods, be sure to describe your service area and demonstrate that it includes some of those neighborhoods.

- **Change the proposal to the funding source's preferred length – generally less than ten pages for a foundation proposal and about five pages for a corporate proposal** (excluding the Summary, which usually goes first and isn't numbered, the budget, and any charts or attachments). This means identifying the most important information and then presenting it concisely. If you are modifying a foundation or corporate proposal for a public agency, you will probably be expanding the narrative; public-sector proposals usually call for proposals that are at least 20 pages long, without attachments.

- **Revise and rewrite to create a strong, concise proposal.** The proposal is likely to be far more effective if you use the original proposal as a source of information, but are willing to rewrite narrative sections as needed to make sure they fit the format, interests, and length limitations of the new funding source. You may find that the goals and objectives, tasks, management, evaluation plan, and capability information stay quite similar, while more flexible narrative sections such as the needs statement and description of project components are most significantly changed.

- **For private-sector funders, redo the summary to make it an effective marketing tool.** Usually a public-sector proposal abstract must include specific required information, and it may be the only part of your proposal read by some review panel members who are not among the primary or secondary reviewers assigned to your application. However, the quality of the abstract does not determine whether your application will be read; you know when you submit a public-sector application in response to an Application Guidance that it will be read and reviewed. On the other hand, foundations and corporations are not required to read or acknowledge your proposal. The proposal summary can be an important tool to motivate someone to read the entire proposal. Write it last, put it first, and be sure it presents your project and your organization clearly and effectively.

- **Review the entire proposal for content, format, and flow.** If possible, ask someone from outside the organization to read the proposal and see if that person finds it clear and compelling. Improve transitions between sections as needed.

- **Finalize the budget.** Now that the proposal is complete, review the budget to be sure that staffing, level of effort, and line items all fit the proposal narrative. If not, change either the proposal or the budget.

- **Put together attachments.** Some of the attachments needed by public-sector agencies are not necessary for private-sector funding sources. Most private funders would like to see summary resumes of key agency and project staff, but do not want a complete set of two-page resumes, nor do they usually want to see detailed job descriptions. They may be interested in letters of commitment from other agencies, but not letters of support. On the other hand, foundations and corporations typically do want to see an annual operating budget for your organization, proof of your tax-exempt status (your letter from the Internal Revenue Service), a list of your Board of Directors with affiliations, and a few news clippings demonstrating your credibility and the quality of your work. Be sure the length, format, and content of the attachments fits funding source requirements and preferences.

- **Prepare a table of contents.** Foundations and corporations like a detailed table of contents, even if the proposal is short. Increasingly, public-sector funding sources also request them, and they can be very helpful to reviewers in finding information in the narrative or appendices.

- **For a private-sector funding source, prepare a cover letter.** Public-sector funding agencies do not usually require a letter. However, it is important for private-sector proposals. The letter should describe the purpose of your proposal, indicate the amount of funding you are requesting and for what purposes, and describe the project and the agency so that the funding sources becomes interested in reading your proposal.

CONCLUSION

Modifying proposals to fit different funder needs is challenging at first, but can become a straightforward process after some practice. The key is to do the revisions in a well organized, systematic way, and to work towards a proposal that effectively targets the new funding source–so that it appears to have been written just for that funder.