

**The University of Massachusetts
Office of Foundation Relations**

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Basic Guidelines for a Letter of Inquiry*

(*also known as a Letter of Intent, a query letter, a pre-proposal, or a concept paper)

Background: Your first contact with a foundation should be to request information about the foundation's missions and goals, specifically an annual report, giving guidelines, and grants list. If – after carefully reviewing this material – you determine that this foundation is an appropriate match for you, your next contact will be a Letter of Inquiry, which is a brief summary of your project.

A Letter of Inquiry is a timesaver for both the foundation reviewer and the proposal writer, as it allows the reviewer to assess quickly whether or not there is a good match between the foundation's interests and the proposer's project. If the reviewer determines that it is a good match, he or she can request a more complete description as would be found in a full proposal. In fact, when you read the words, "proposals not accepted," it does not necessarily mean that a Letter of Inquiry is out of order. If the reviewer likes what he or she reads, you will be invited to submit a full proposal.

Important: A Letter of Inquiry is not a vague exploration of an idea. It is assumed that you have already thought through your proposed project – including a budget! – and are just presenting an abbreviated description.

Technique: Consider how concise, yet engaging, you must be to keep someone's attention in conversation when there are many other people around also wanting that person's attention. And so it is with the Letter of Inquiry. Use your words smartly. Avoid jargon, boosterism, flowery subjective statements that can't be supported by facts or others' statements. Write as if you are making a logical, persuasive argument.

Contents of a Letter of Inquiry: Please review the Tip Sheet entitled "Basic Components of a Proposal" because a Letter of Inquiry is a condensed version of a proposal. You are giving the highlights of the same information in much the same order. For example, where you might use a page to cover an executive summary, in a Letter of Inquiry you do it in a paragraph. Letters of Inquiry generally are 2-3 pages; oftentimes, the foundation will indicate a page limit. Do *not* go over that limit!

Unless otherwise indicated by the foundation, the contents will generally follow this format:

1. Opening Paragraph

This serves as your summary statement.

It should be able to stand-alone. If the reviewer reads nothing else they should know what you want to do from reading this paragraph. Make it clear what you want the reader to do (ie: consider funding the project)

Answer the following: who wants to do what? how much is being requested? is this a portion of a larger project cost? over what period of time is money being requested?

Example: “The School of Nursing at the University of Massachusetts at Amherst (UMass) seeks support for developing an innovative undergraduate and graduate curriculum in psychiatric mental health nursing that will prepare expert nurse clinicians in the delivery of mental health services to at-risk adolescents in the community setting.

We are requesting \$87,000 over a two year period.” [FYI – This proposal got funded!]

You also may want to say if you are responding to an RFP (Request for Proposals) or make the connection between the foundation’s interest and your project.

I know this seems like a lot to address, but keep this paragraph short! You will have time later for explaining your rationale for why you want to do the project, your methodology, or for establishing your credibility.

2. Statement of Need (1-2 paragraphs)

This section answers the “why” of the project.

Explain what issue you are addressing.

Explain why you have chosen to respond to this set of issues in the way that you have.

State briefly why this matters in the area in which you will be working.

Note who benefits. Make sure you can indicate the public good achieved.

3. Project Activity (this will be the bulk of your letter)

This section answers the “what” and “how” of the project.

Give a general overview of the activities involved. Give more detailed information to the degree that space allows.

Highlight why your approach is novel and deserving of the special attention that funding connotes.

Indicate if there will be collaboration with other organizations and what their roles will be. Be specific about who does what.

4. Outcomes (1-2 paragraphs; you can put this before or after the discussion of activities)

State the specific outcomes you hope to achieve.

Indicate how evaluation is part of the project – how will you know you’ve achieved these outcomes?

5. Credentials (1-2 paragraphs)

Demonstrate why your institution or your staff is best equipped to carry out this activity.

Put any historic background about the institution here.

Brag with substance. Indicate awards, rankings, and tangible measures that set you apart from your peers.

6. Budget (1-2 paragraphs)

State what the total project cost will be and how much of that you would be requesting from the foundation. Indicate broad categories of activities to be funded.

Include other sources of funding, both cash and in-kind. Especially indicate what your institution will contribute. Do not overlook the value of all in-kind contributions, including those of your collaborators.

7. Closing (1 paragraph)

Offer to give any additional information the foundation might need.

Give a contact name and contact information for foundation follow-up.

Express appreciation for the reader's attention or the opportunity to submit if it is in response to a Request for Proposals (RFP).

Specifically indicate you are interested in discussing the project and will "contact their office" by a certain date (allowing time for them to receive and read the letter).

8. Generally it is best to have the highest ranking person available sign the letter even if they are not identified as the "contact" person. This indicates institutional support.