

Proposal & Report Design Best Practices Guide

Proposal and reporting templates are more than administrative tools—they shape how power, trust, and partnership are experienced in grantmaking. The questions funders ask and the language they use signal what is valued and who is trusted, and how decisions are made. When forms are overly complex, duplicative, or compliance-driven, they can unintentionally increase burden and reinforce inequities.

This guide offers practical principles and examples to help funders align their materials with trust-based, equity-centered practices that reduce burden and strengthen relationships.

1. Purpose & Decision Use

Ask Only What You Will Use

Effective grantmaking requires clarity about what information is being collected and why. Proposal and report forms should collect only the information necessary to make thoughtful funding decisions, meet compliance requirements, and support meaningful learning. When questions are included “just in case” or because they’ve always been there, they add burden without increasing insight. Over time, this erodes trust and efficiency.

Designing backward from decisions ensures that every question earns its place. If information does not directly inform how funding is allocated or learned from, it likely does not belong on the form.




In Practice:

Before including a question, ask:

- How does this question inform a decision?
- Are we asking for data we don’t meaningfully analyze or use?
- If removed, would our decision materially change?


Make Forms Proportionate to Grant Size

The level of detail requested should match the size, scope, and complexity of the grant. A \$10,000 grant should not require the same application and reporting narrative as a \$500,000 grant.


 **In Practice:**

Before including a question, ask:

- Is the level of detail asked proportional to the grant size?
- Is the word limit proportionate to the question's importance?

 **Reframing Example:**

Commonly Used Prompt	→	Proposed Reframing
Provide an overview of your organization's history, activities, and goals.		Briefly describe your organization's core activities most relevant to this funding opportunity (1-2 paragraphs).




Narrows focus to the funding opportunity to ensure information directly supports decision-making.

2. Simplicity & Accessibility


Even well-intentioned forms can create unnecessary friction. Complicated language, duplicative uploads, and rigid platforms disproportionately affect smaller organizations, grassroots groups, and organizations without dedicated grant staff. Simplifying forms removes unnecessary paperwork so applicants can focus on their core activities and services.

Eliminate Duplication and Reduce Burden


Trust-based philanthropy encourages funders to do their own homework whenever possible. If information is publicly available or previously submitted, reconsider asking for it again.

 **In Practice:**

- Pull IRS 990s directly.
- Pre-fill known organizational data in forms.
- Accept existing materials (strategic plans, annual reports).

 **Reframing Example:**

Commonly Used Prompt	→	Proposed Reframing
Upload audited financials, Form 990, annual report, and full organizational budget.		Upload your most recent audited financials. We will access your Form 990 directly.



The updated prompt does the homework on behalf of applicants, helping reduce redundant work.

Design for Accessibility & Usability

Consider both how your questions are written and how your form works. Complicated systems, unclear instructions, and jargon-heavy language can unintentionally exclude smaller organizations and groups. Clear, accessible design expands participation and is easier to complete and review.



In Practice:

- Use plain, direct language.
- Define any necessary terms and avoid jargon, acronyms, and technical language.
- Write one question at a time and avoid bundling multiple prompts together.
- Ensure mobile-friendly forms.
- Include save-and-return and auto-save capabilities.
- Provide clear character/word counters.
- Allow PDF uploads instead of requiring duplicate data entry.



Reframing Example:

Commonly Used Prompt

How does your organization emphasize asset-based community development?



Proposed Reframing

How does your organization uplift community strengths and assets in your programming?



Replaces field-specific jargon with plain language, broadening accessibility.

3. Equity & Power

Grant applications and reports often reflect institutional assumptions about expertise, credibility, and accountability. Without intentional review, forms can privilege organizations with greater administrative capacity, English fluency, or professional grant writing experience. Reviewing templates through an equity and power lens helps shift from transactional oversight to relational partnership—ensuring that requirements do not unintentionally exclude or disadvantage the very communities funders aim to support.

Shift From Compliance to Learning

Proposals and reports should strengthen partnership and shared understanding, not function as surveillance. Questions should invite insight and assume that grantees are closest to the issues they address.



In Practice:

- Ask yourself if phrasing invites partnership or signals hierarchy.
- Ensure questions invite reflection, adaptation, and shared learning rather than performance policing or fault-finding.
- Reporting should surface insights, not simply confirm meeting benchmarks.



Reframing Examples:

Commonly Used Prompt

If objectives were not met, explain why.

Proposed Reframing

What shifts, challenges, or learning emerged during this grant? How did you adapt?

Shifts emphasis away from compliance and takes a solutions-focused approach rather than placing blame.

Provide quantitative metrics for each outcome.

Share the indicators most meaningful to your work. Both quantitative and qualitative insights are welcome.

Allows grantees to share both quantitative and qualitative insights to paint a better picture of overall achievement.

Describe any deviations from approved budget.

Were there any changes in how funds were allocated? If so, what informed those changes?

Assumes good intent and invites transparency, rather than positioning changes as compliance violations.

Use Inclusive & Accessible Language

Language is not neutral in grantmaking. The words embedded in proposal and reporting materials shape how power, trust, and accountability are experienced by applicants and grantees. Even small phrasing choices can reinforce deficit narratives, signal hierarchy, or unintentionally privilege certain types of organizations and communication styles.

Commonly used terms often reflect institutional priorities or legacy practices that require organizations to frame their work—and the communities they serve—through narratives of scarcity or crisis. When funders intentionally examine and reframe language, they create forms that are more accessible, more respectful, and more aligned with equity-centered and trust-based values.

Inclusive language does not avoid complexity or challenge. Instead, it shifts who carries the burden of interpretation—from grantees proving worthiness through deficit framing, to funders engaging thoughtfully with context, strategy, and shared responsibility.



In Practice:

- Use person-centered language.
- Reframe questions to be strengths-based rather than deficit-based. Emphasize context, assets, and systemic conditions rather than individual shortcomings.



Reframing Examples:

Commonly Used Prompt

Describe the need your community faces. Why is this issue urgent?



Proposed Reframing

What context shapes your work, and why is it important to the communities you serve?



Shifts away from crisis-driven framing and encourages applicants to describe context and purpose.

Who does your organization serve, and what challenges do they face?



Please describe the community served by the organization including key demographics and how community members shape, inform, or lead your work.



Emphasizes community agency and shared power rather than participants as recipients of services.

What financial challenges threaten your organization's sustainability?



How are you thinking about organizational sustainability over time, and what resources or conditions support that vision?



Removes scarcity framing and invites reflection on long-term planning and strategy.



People-Centered Language Reframing Examples:

Commonly Used Language

Homeless



Proposed Reframing

- People who are unhoused
- People experiencing homelessness
- People experiencing unstable housing
- People who are insecurely housed
- People in transitional housing
- People in emergency shelter

Low-Income People

- People whose income is below the poverty level
- People with low incomes
- People experiencing poverty

Juvenile Delinquent

- Young person or young adult impacted by the justice system
- Justice-involved youth

Substance Abuse

- Substance use (generally for alcohol and other drugs)
- Substance misuse (more specifically, for prescription or over-the-counter drugs)
- Substances or drugs used other than as prescribed or directed (for prescription or over-the-counter drugs)

Disadvantaged Communities

- Communities facing systemic barriers
- Communities that are historically and actively marginalized



Reduces stigma, signals respect, and allows organizations to emphasize context and systemic conditions.

Provide Flexibility in Format

Rigid narrative requirements privilege certain communication styles and organizational structures. Flexible formats recognize diverse organizational capacities and cultural approaches to storytelling.



In Practice:

- Include guidance rather than limits on word or character counts.
- Permit bullet points.
- Allow links to videos, dashboards, audio recordings, and other formats that reflect different communication preferences.



Reframing Example:

Commonly Used Prompt

Describe your project's progress over the past year.



Proposed Reframing

Describe your project's progress over the past year. You may respond in bullet points, short narrative (1-2 pages), or upload a video or audio recording in place of written narrative.



Signals substance is valued over polish and reduces inequities for organizations without dedicated grant writers.

Resources For Deeper Practice

The Center for Effective Philanthropy (CEP)

The Center for Effective Philanthropy conducts research and provides tools to help funders improve their effectiveness and relationships with grantees. CEP's research highlights how funder practices, communication, reporting requirements, and responsiveness impact trust, equity, and overall grantee experience.

- Reporting: Perspectives & Practices
- Reimagining Reporting, Part 1: Insights From the Field
- Reimagining Reporting, Part 2: Sharing the Vision

FrameWorks Institute

A leading research organization that helps mission-driven organizations communicate about social issues in ways that build understanding, reduce stigma, and shift dominant narratives. FrameWorks' work is widely used by funders to examine how language choices influence meaning, responsibility, and public will, and to move away from deficit-based framing toward context-rich, solutions-oriented narratives.

- Framing Fundamentals, Frameworks Institute

Trust-Based Philanthropy Project

The Trust-Based Philanthropy Project outlines how funder practices—including application and reporting requirements—can unintentionally reinforce power imbalances. Their guidance emphasizes simplifying processes, clarifying purpose, and trusting grantee expertise, all of which are reinforced through strengths-based and equitable language choices.

- Six Trust-Based Practices at-a-Glance, Trust-Based Philanthropy Project
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Asset-Framing and Ethical Storytelling Resources

Asset-framing and ethical storytelling approaches offer practical guidance for describing people and communities by their strengths, leadership, and contributions rather than by perceived deficits. These resources are especially useful for funders seeking to align reporting and narrative requirements with equity values while avoiding stigmatizing or extractive storytelling.

- The Health Equity Narrative House Action Guide, Robert Wood Johnson Foundation

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