The Secrets of Their Success

Seven pointers from some experienced grantseekers on how to work more effectively and raise more money.

#1 Know Your Own Programs

In organizations that have a separate development office, there is often a tendency for development staff to work in isolation from the program staff. But as a "grantsperson," you're more than just a fundraiser. You're an advocate for your group's programs. You have to explain what your organization does and why it's important. Then you have to persuade a funder that it's worth investing in.

To do this well, you need to have a thorough knowledge of your organization's programs. "Professional development people sometimes have trouble understanding what program people are saying," observes Kevin Canavan, Director of Development at Inter-Community Mental Health Group in East Hartford, Conn. "That can make it difficult to articulate what a program is about when you're speaking with a foundation representative."

Canavan has viewed the grants process from multiple perspectives. Before joining Inter-Community Mental Health Group, he was a development officer at a large school for troubled youth, ran the annual fund at a small liberal arts college, and analyzed proposals and supervised program officers at a community foundation.

His advice to development professionals: Spend time with the program staff. See what they're doing and hear what they're saying. Ask questions.

Every now and then, take a program person out to lunch. Get them to tell you about their work and why it matters. Don't be afraid to take notes for later reference.

Then change hats. Imagine that you are looking at the program for the first time through the eyes of a funder. How does this program really operate? Is it effective? How can it be improved? Can you quantify the products and results? Can you describe them in terms an ordinary person can understand?

Another often neglected source of information about current programs is your own organization's publications. Research and advocacy pieces are the staple of many a nonprofit. Yet too few development professionals ever bother to read them carefully. Set aside time in your schedule each week to familiarize yourself with these publications, plus any position papers or program reports your organization produces. If you have questions about something, ask the author.

#2 Talk to Other Grantseekers

Lots of folks think of grantseeking research way too narrowly. At least that's how it seems to Jane Fox Johnson, who has been writing grant proposals for more than 20 years for groups ranging from Washington, D.C.'s Arena Stage to the Joint Center for Political and Economic Studies and the Center for Community Change.

Now a private consultant, Johnson says that doing your homework doesn't just mean researching funding sources in directories. It means digging into foundations' annual reports. It also means talking to colleagues who work for other groups to see who's getting money and to find out how they do it.

"Every development person needs a network of other development people that can be trusted," Johnson says. Her own network has been getting together monthly for more than five years to share information and to brainstorm. The network members don't have to be in the same field, Johnson says. But they do need to feel comfortable with one another, and they should be willing to strategize around ideas and issues that transcend their own immediate situations.

As for those annual reports, Johnson advises reading them regularly. If you see a grant or two you wish you'd gotten, don't just ask yourself, "How did they get that grant?" You can probably find the answer – and learn quite a bit about what it's like to work with the funder – by picking up the phone and calling the grantee.

Successful grantseekers don't just sit in their offices poring over reports, Johnson says. They get on the phone. They talk to people.

#3 Be Prepared

The best way to tell your program's story is in a face-to-face meeting. That way, you get to look a funder straight in the eye and explain why your project is worthy of support. Good meetings build strong relationships with funders.

But first you have to get in the door. And to do that, most people assume, you need a personal connection.

Not necessarily, according to Kris Robinson, Vice President for Development at the National Women's Law Center and formerly a development officer with the Center to Prevent Handgun Violence. If your issue is in the public consciousness, Robinson says, funders will sit up and take notice. But it's up to you to make sure they know you're there – and you must be prepared to act when the right opportunity presents itself.

"Recently sexual harassment has been a hot topic," Robinson says, "so we can take advantage of the media buzz. It's an issue we've been working on for years, but the fact that it's hot right now gives us an opportunity to approach funders who might not otherwise be compelled to fund that work. The same was true when I was working on handgun control. If the Brady bill was front-page news, or there was a sudden spate of drive-by shootings, that would make it a lot easier to approach a funder with whom we didn't have some personal contact."

As Robinson points out, timing is crucial. If your issue is on the front burner today, don't assume it will stay there tomorrow. Seize the moment. Anticipate when your issue will be causing a stir in the press, and be prepared to move. Ask for a meeting when the funder is likely to be most receptive, when the media have paved the way.

Of course, most funders have a longstanding interest in specific issues, so you don't always have to wait for the right zeitgeist before approaching them. Kathy Super of Second Harvest, a Chicago group that provides donated food to more than 50,000 charitable programs nationwide, has a set plan for requesting meetings with funders. She starts by sending a brief program report to corporate and foundation prospects. Then she initiates personal contact by calling the prospects to confirm that they've received the material.

Always keep these calls short and to the point, Super advises. "We treat donors like they're the busiest people in the world and don't have lots of time for phone calls," she says.

Here's how you can follow a plan like Super's:

- First, identify the right person at the foundation: president, vice president or program officer, and target that person for a phone call. If possible, of course, find a personal link through someone who already knows that person. But don't give up if you can't find one.
- Next, just before your call, fax a "one-pager" on your program stating that you'll be calling to follow up. If you do have a personal link, preface the "one-pager" with something like: "Jane Jones suggested I contact you about our group's work in early childhood nutrition."
- Finally, make your call. Start out roughly as follows: "Ms. Jones thought you would have an interest in our nutrition project. I hope you'll look at the one-pager on our work I faxed yesterday, if you haven't already seen it." Then ask about setting up a meeting or submitting a proposal. You will know soon enough whether you're getting anywhere.

If you do get a meeting, don't blow your chances by winging it. Again, be prepared! Almost everyone agrees that you should prepare, prepare, and prepare some more for funder meetings. The more your executive director is involved – and the more he or she knows about the work of the funder – the better. A strong meeting of the minds between the executive director and a foundation program officer can sometimes cement an agreement about a grant very quickly.

Always make a checklist of materials you will need to bring along: publications, charts, data – whatever helps get your point across in the meeting. Be sure to pull everything together well in advance.

Kevin Canavan of Inter-Community Mental Health Group emphasizes the importance of "dry runs," during which you play the part of the donor and ask hard questions. Try to get the discussion to focus not just on activities, but on results. What will the deliverables be? If this program didn't happen, who would be hurt? Can the program be replicated? Will it bring about meaningful change? How will we know if it succeeded?

Schedule your dry run at least a day ahead of time. Even if the director is very well-versed in the program's details, the director and you should write up a short list of important talking points before the meeting. If program staff will also be attending, work out with each of them the key points to emphasize.

Set strict time limits for each segment of the presentation (without making it look as if you're following a rigid script). Allow time for the foundation people to ask questions and interact.

#4 Empower Program People

In the competition for grants, solo practitioners face an uphill struggle. If your primary responsibility is development, you need to enlist the active participation of your program staff. The more you're able to inspire them to get involved, the less you will need to "huff and puff" on your own. The more of them who require little or no help, the likelier you are to reach or exceed your funding goals.

Start by demystifying the grantseeking process. Show program staff how to do their own grant research and encourage them to do it. Explain who the likely funders are, what sorts of projects they favor, and why.

Some staff members will eventually be able to write their own proposals. Others may be able to produce no more than a simple concept paper. Help them along by offering an outline or a list of questions. With a little time and effort, you may succeed in developing their answers into a viable proposal.

Encourage your executive director and other senior management to praise and acknowledge program staff for hard work on proposals and for playing a strong role in grantseeking. Younger staff may well discover that getting grants increases their chances of doing important projects, and also advances their careers.

The Girl Scouts Council of Hawaii, without the luxury of a large development office, has made a virtue of necessity by actively involving program staff in the grantseeking process. In doing so, the Council has vastly expanded its reach, according to Executive Director Joyce Richards. "Our staff gather testimonial quotes that are helpful and identify ways to give the organization the competitive edge," Richards notes.

"It helps to do an annual assessment of projects on the burner," she adds. "Assign the work of narrative, budget, and research to appropriate staff well in advance of the due dates."

Jo DeMarco, Director of Corporate and Foundation Relations at Marywood University in Scranton, Pa., points out that engaging staff and faculty in grantseeking has an important fringe benefit: "It makes them more sympathetic to the magnitude of the process and what goes on in the grants office." DeMarco, who came to fundraising after working in public relations for nearly 20 years, is spearheading a grants information newsletter at Marywood that will list useful Web sites and on-campus resources, profile funders that support private higher education, and spotlight the work of successful faculty grantseekers. "By recognizing those who have won grants, we hope to gently prod others to follow suit," DeMarco says.

Once you have a core group of empowered program people, you can play the role of facilitator and coach. Remind them when they need to get a proposal in, help them to rewrite their proposals, perform a "quality control" function. Otherwise, move aside – especially when it comes time to deal with a funder directly.

Development people sometimes find it hard to accept, but for the most part, foundation program officers do not want to spend their time with development people. They want to talk to the people who are responsible for the programs. So make every effort to put program staff in direct communication with foundation people in meetings or on the telephone, to answer questions and to brief them on the programs you are proposing.

Save time by taking yourself out of meetings and phone calls between good program people and a program officer. Set up the meetings or phone calls, brief the staff members, provide talking points, ask for handwritten notes, and meet afterwards to plan follow-up.

But in the end, trust the program people whom you've empowered. The more of them you have, the more grants you'll get.

#5 Know Your Audience

When it comes to writing proposals, Kathy Super of Second Harvest says that the key is understanding your readership. "The secret is to put yourself in the donor's shoes," she says. At every stage of the proposal-writing process, you should be asking the same kinds of questions that a skeptical reader might ask: Why would anyone bother reading this? Who would care? Why should they care? What difference is this going to make?

According to Super, producing a credible needs statement is often the major hurdle. Too many charities focus on the organization's need, rather than the needs of clients. Many others describe the need too broadly – trying to explain how bad hunger is in America, for example. Second Harvest insists that a proposal focus on the particular need to be addressed by the project in question: "What will be the impact of this project on this community?"

"By all means include an evaluation," Super adds. "Most people overlook that." Second Harvest builds evaluation into almost everything: a completed program, a new logo, the general operating portion of the budget. Super urges proposal writers to state explicitly which questions will be asked to measure success. Their proposals always include the following: "These are the questions Second Harvest will ask itself to determine if the need is met." When writing your own proposals, list between three and ten such questions that you and your program people have agreed upon.

Writing for the reader also means following the funder's guidelines. Foundation representatives routinely complain about how many proposals come in that simply ignore their guidelines. When you follow a funder's designated format, or answer the questions in the order asked, you make the program officer's job much, much easier. Remember that these folks usually have to wade through stacks and stacks of proposals. The ones that don't follow the foundation's guidelines are the ones most likely to be dropped.

There are other ways to turn off a reader, including simple carelessness. Marywood University's Jo DeMarco recalls visiting a program officer at a medium-size foundation several years ago. "I get at least 15 proposals a day," he told her. "This is what I want to say to most of the people who send them: 'Please, at least spell my name right. Then try to make me want to read the second page!"

Also, keep in mind that the "audience" for your proposal may be bigger than a single program officer. Even if that person happens to be a technical expert, he or she will eventually need to explain your grant request to board members and others at the foundation who are not. Putting things in lay terms helps the program officer win the battle for your proposal within the foundation.

The late Senator John Heinz, Chairman of the Alliance to Save Energy, understood this implicitly. Heinz wasn't just a policy expert; he was also a politician, who knew how to motivate people to action. He made sure that if you wrote a proposal for the Alliance, you didn't simply state how many

BTUs of energy would be saved by a project, or how many megatons of carbon emissions could be avoided. You had to describe these goals in terms that ordinary people could understand. What will these savings mean to the average household? How will they affect the budget of a family of four living at or near the poverty line? What will be the impact on the air quality in my city?

Those are the kinds of questions that any proposal writer needs to ask – and answer.

#6 Keep In Touch

Periodic communication with funders reminds them of the aims of your organization. Such communication can be as simple as a phone call letting them know about a recent program success, a short personal letter to go with a new publication or an annual report, or a handwritten note attached to a newspaper or magazine clipping.

Robbie Ross Tisch, now senior consultant at the Management Assistance Group, has used all of these techniques while working as a development officer with the International Youth Foundation, the Center for Marine Conservation, and the Children's Defense Fund.

"The communication must be appropriate to that particular person's interests," says Tisch. "And it has to be sincere. I know we're doing it because we think it will ultimately raise money. But underlying that transaction is the reality that both you and the donor care about the same things."

Keep a list of current, past, and potential funders and review it periodically. Ask yourself: Does this person know what we're doing now? How recently have we spoken? How much do I know about their present interests? If I, the executive director, or a board member were to call them up, would they take the call?

One person who used a "keep-in-touch list" to great advantage was George Bush. Throughout his career, Bush's staff provided a daily list of a few people – political allies, contributors, corporate leaders, or just old friends – to contact. Every morning, Bush would sit down and write them letters, longhand and personal.

With all the e-mail, voice mail, faxes, and computer-generated form letters bombarding us these days, most of us tend to forget what was obvious to Bush: People want to know that they matter to you. Often, the best way to communicate that is with a few handwritten lines.

So encourage your executive director and board members to write letters, and write your own. And never use these notes to ask for more money! Instead, use them to thank your funders, tell them about your progress, or describe an important new program.

#7 Focus on the Goal

The successful development professional works with program staff to set ambitious – but achievable – goals. To do this, you should be meeting regularly with each program leader within your organization. Find out how much funding is required to meet their needs. What else would they like to do with their programs if they only had the money?

Part of your job is to set realistic expectations about what is likely to happen in a grant search. After all, you'll bring good news when a foundation is interested or a grant is awarded. You must also be willing to bring the news that a goal is unrealistic, unlikely, or impossible to achieve.

Make a short funding goal sheet for each program for the next one, two, and three years. Periodically update senior management and program leaders on progress. When you reach a goal, announce it and celebrate.

Then ask yourself: what were the factors that led to the success? And if you do not succeed, be up-front about it – first of all with yourself, but also with your colleagues. Was the goal too ambitious? Or was the effort too weak?

Have a debriefing. Ask for everyone's input as to what could have been done more effectively. What should be done differently the next time around?

Once you've done that, don't mourn. Adjust your goals if you have to, and keep moving forward.

Martin Dickinson is Vice President for Development of Communities in Schools, Alexandria, Virginia.