Storytelling for Grantseekers

A GUIDE TO CREATIVE NONPROFIT FUNDRAISING

SECOND EDITION

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PREFACE

Storytelling is a powerful art form. Stories entertain, educate, and enlighten. They have the ability to transport an audience to another location and teach them about issues and people they may know nothing about. The same is true of grantwriting.

Yet many nonprofit and development professionals, both newcomers to the field and those with years of experience, contemplate the task of writing a grant proposal with as much enthusiasm as they would taking a trip to the dentist for a root canal. Those who are new to the field are likely to approach grantwriting with a "deer in the headlights" stare. The process seems daunting, intimidating, frightening. Those who have been in the nonprofit sector for a long time too often grudgingly accept grantwriting as a necessary chore, a boring task to complete in order to get to perhaps more enjoyable fundraising activities like soliciting major donors, drafting appeal letters, and organizing special events. For these folks, there is no joy in preparing a proposal; it is just something to get done, like making your bed and washing the dishes.

I have observed that only a rare few actually delight in seeking grants and writing grant proposals. I am one of these uncommon individuals. I wrote the first edition of this book to help my development colleagues get excited about the grantseeking area of fund development and to put the joy and creativity back into the grantseeking process. Considering the number of people who have contacted me after reading the first edition of my book, I think I succeeded. Dozens of times, I heard that *Storytelling for Grantseekers* inspired and informed grantwriters

of all levels of experience. Better still, I heard from several who credit *Storytelling* with helping them secure a grant. There's no sweeter news than that!

When I was approached by my editor to work on a new edition of *Storytelling*, I didn't hesitate to agree. The book was ready for an update, though the message of *Storytelling* is still valid and will be a fresh concept for many in the nonprofit field.

The nonprofit field is dynamic, and technology is ever changing; I wanted an opportunity to acknowledge the changes and comment on them. Probably the most significant change in the grantseeking field over the past eight years is our use of the Internet. Today, we routinely use online technology to research funders, review and download guidelines, and submit proposals. In this second edition, I cover Internet issues in much greater depth than I did previously. Responding to reader requests, I also added new proposal excerpts from a wider range of nonprofit agencies (from grassroots groups to large institutions), and I included two full letter proposal examples in the Appendix. Finally, I reorganized a few chapters and added two new ones, and I tried to smooth out some rough grammatical spots.

I work in the nonprofit sector because it allows me to contribute in a meaningful way to my community. I suspect that the majority of you who read this book have chosen to work in the field for the same reason. It is our passion for the work, not the brass ring of stock options or growing retirement accounts, that keeps us going. Yet it is precisely this passion that is most often missing in grant proposals. My goal is to put the passion back in proposal writing!

I believe that you will be more enthusiastic about writing proposals, and your proposals will be more passionate and consequently more effective, when you begin using the storytelling technique described in this book. No doubt, this approach will be entirely new and different from the ones most of you are currently using.

For too many years, grantwriting workshops and how-to books have emphasized only the mechanics of writing grant proposals. For example, workshops and textbooks are good at covering such topics as the essential components of the proposal narrative; the definitions for outputs, process outcomes, impacts, goals, and objectives; and how to craft a program budget. But too many development professionals come away with glazed eyes after attending these workshops and reading such books. Grantwriters become overly concerned about technique and form. What's missing are the creativity and passion. That's what the storytelling approach puts back into the grantwriting process.

Whether you are a grantwriter, development director, executive director, board member, or volunteer, I hope you will come to the realization that grantseeking is as much a creative exercise as it is a technical one. By and large, grantwriters tell stories. There is great drama and excitement in our proposal stories. Telling a story is powerful. Writing a grant proposal is the telling of a powerful story.

CONTENT AND ORGANIZATION OF THIS BOOK

I begin with an introduction that discusses how the storytelling approach to grantseeking was developed and why you (and your agency) will benefit from using this method.

Yet before anyone sits down to write a proposal story, there are some preparatory steps to take. Chapter One describes what you and your agency should be doing to get ready for the grantseeking process. In Chapter Two, I offer guidance on how to effectively and efficiently research and identify your agency's target audience—that is, funders most likely to award a grant. This chapter also covers the broader topic of grantor-grantee relationships, from courtship and cultivation to stewardship.

Chapter Three is new. Although I covered letters of inquiry in the previous edition, the discussion was brief and somewhat buried. Because letters of inquiry are so widely used and often a critical "first step" in the grantseeking process, they deserve their own chapter.

Chapters Four through Seven demonstrate how to present your agency's story effectively in a proposal narrative. I believe that creative storytelling can be woven into the traditional proposal narrative form, as well as in online applications, and these chapters show you how this can be done. Chapter Four begins the sequence of chapters with a discussion of the importance of an opening "hook." From there, your story will progress to an introduction of the characters (the story's protagonist and other main characters) and the setting where your story takes place (location). In Chapter Five, I reveal what (not who) the antagonist is in our proposal stories and provide suggestions for fully developing this "character." In this part of your proposal stories, conflict is introduced and tensions mount. Chapter Six discusses the goals and objectives that will bring a full or partial resolution to the conflict. The evaluation and future funding sections in a proposal can be considered your story's epilogue and sequel; these sections are covered in Chapter Seven.

Proposal stories are not just told in words. Chapter Eight explains how to translate your agency's narrative story into the language of numbers in an accompanying proposal budget.

Once the full proposal story is written, it must be "marketed." In Chapter Nine, I cover the marketing elements of a proposal, namely the summary, titles, and headings. Chapter Ten follows with a discussion of the proper "packaging" of a grant proposal, including what attachments to enclose and what delivery method to use.

Because our proposal stories are often transformed to "live theater," I added a new chapter (Chapter Eleven) devoted to site visits and to the communications we have with funders while our proposals are pending and after a decision has been made. Finally, Chapter Twelve (also new) addresses the topic of how grant-writing skills are transferable to other fundraising areas and even outside the nonprofit field.

Whenever possible, I have included examples from actual grant proposals to illustrate the concepts presented in this book. These proposal excerpts are the works of several excellent writers, who are credited in the text for their work, and myself. In some circumstances, agency names have been changed to respect the wishes of the agency.

In the course of writing this book, what I have learned by rereading my own grant proposals is that I have not yet written the absolutely perfect proposal. And I believe that my talented colleagues would agree that they have yet to write one either. Has anyone drafted the perfect proposal? Has any author ever written the perfect book? I am pleased when I have come close to approaching perfection, and with every proposal I write, I continue to strive for that ideal.

I wrote this book because I have an interesting, compelling story to tell. I hope that in reading this book, you will see that you do too. I wish all readers happy, successful grantseeking!

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Mill Valley, California

Introduction

Why Storytelling?

From the beginning of time, people have communicated their ideas, values, and lessons through stories. At first, stories were told in the oral tradition, often over an evening fire, and passed along from generation to generation. Some stories were later depicted through pictures drawn on cave walls or carved into stone. Over time, our ancestors developed written forms of language and began to memorialize their stories in writing.

The power of both true and fictional stories is demonstrated throughout history and literature. For example, in the Bible, Jesus uses parables—narrative short stories—to convey a double, or metaphorical, meaning. In the Greek tradition, fables and myths are impossible fictional stories that communicate a deeper, again metaphorical, message. *Beowulf* and *The Canterbury Tales* are early epic tales that provide fictionalized accounts of historical (or at least partially historical) events.

Regarding the significance of storytelling throughout the history of humankind, Joel Orosz, author of *The Insider's Guide to Grantmaking* (Jossey-Bass, 2000), says, "In history, great leaders aren't necessarily the smarter people; they're just the ones who tell the best stories" (personal communication, 2001).

People always have used stories to inform, instruct, and persuade others. And storytelling is very much alive today. In fact, a Google search of the word "storytelling" yielded more than fifteen million hits.

Storytelling is used effectively in both the for-profit and nonprofit fields. In the business world, stories are often used in advertisements to sell everything from instant coffee to athletic shoes to weight-loss programs. In the nonprofit field, executive directors and development directors rely on storytelling techniques to recruit volunteers, appeal to potential donors, and inform and influence the broader community. So it makes sense to use this powerful technique when seeking grants. Yet I realized that nobody else in the grantwriting field was talking about integrating storytelling methods into grantseeking. This void convinced me that I had a story to tell to the nonprofit world. This is the story told in this book.

I consciously began integrating the storytelling technique into my grantseeking activities in general, and into my grant proposals in particular, more than a decade ago. There are three good reasons why I started doing so.

First, one of my personal pursuits is writing short fiction. I came to realize that strong grantwriting uses most, if not all, of the same elements that are found in good fiction. Accordingly, the storytelling techniques I developed while working on my short fiction naturally started finding their way into my grant proposals.

Second, I believe that storytelling is at the core of all successful fundraising. Storytelling is an effective way to communicate a need, offer a solution, and present an opportunity for someone to help by making a financial contribution. Appeal letters, Web sites, telethons, and major-donor campaigns use storytelling techniques to inform and motivate potential donors. Shouldn't grant proposals do the same?

Third, I listened to what grantmakers themselves were advising applicants to do. What I heard foundation program officers and others who review proposals say was "Tell us your story." As the saying goes, "Everyone loves a good story," and this includes program officers.

Joel Orosz offers the following observation (personal communication, 2001): "When Charles Dickens wanted to talk about generosity, he wrote *A Christmas Carol,* not a grant proposal. Ultimately, the grantseeker has a story to tell in the proposal. Rather than disguise or hide it, why not just tell it?"

The former chair of an employee contributions committee whose corporation annually donates more than a quarter of a million dollars to charities in the San Francisco Bay Area echoes Orosz's advice: "We'd love to see more proposals presented as stories. Those that do are easier to read and understand, and they are the ones that are more apt to be funded."

So the best news for grantseekers is this: using the storytelling technique works!

WHAT IS THE STORYTELLING METHOD?

Nearly every story ever written or told has certain common elements. These elements include characters (usually both a protagonist and an antagonist, as well as assorted other major and minor characters), a setting (both time and place), and a plot. In a typical story plotline, the author first introduces the characters, then creates a conflict between the characters and builds tension. Most likely, the tension escalates to a climactic or pivotal moment, when something happens that forever changes one or more of the lead characters. After this dramatic event, the story eases to its conclusion.

A strong, effective proposal narrative has these same elements: characters, a setting, and a plot that includes the building of tension, the drama of a climactic moment, and the resolution offered by a satisfying conclusion. This book will explain how these story line elements actually fit within the standard narrative structure of a proposal and how you can begin to incorporate them into your own grant proposals.

And as you probably already know, there is more to successful grantseeking than simply writing a proposal. Identifying which funders you should submit your proposals to, developing a relationship with these grantmakers, and effectively presenting your proposal package are all part of the grantseeking process. The storytelling technique applies to each and every step along the way.

YOU ARE ALREADY A STORYTELLER

I want to emphasize that you do not need to be an accomplished fiction writer to use the storytelling method presented in this book. Whether you realize it or not, you are already a storyteller. In our daily lives, the oral tradition of storytelling is very much alive and well. "What's new with you?" asks a friend or colleague. And you proceed to talk about what's been going on in your life. That's a story, and you're telling it.

In your professional life you are a storyteller when, at either a work or social gathering, you answer questions such as these: What does your nonprofit agency do? What's its mission? What kinds of people does your agency help? What's the biggest problem facing your agency these days? How much money does it take to

run the agency? What does your agency plan to accomplish in the coming year? Most likely, not a day goes by that you don't have an occasion to tell somebody at least a portion of your agency's story.

Although you may feel comfortable verbally discussing your agency's story, perhaps it hasn't been as easy to actually write it down in the form of a grant proposal. I'll show you how to get your agency's story on paper so that your proposals will be not only more fun to write but also more enjoyable for the funder to read. You'll learn how to grab the reader's attention with the opening sentence and hold it until the closing paragraph.

There's another reason why the storytelling technique should be a comfortable one to master. Throughout our lives, we all not only tell stories to each other but also read and listen to stories as well. We all know a good story when we read one, whether it is short fiction or a novel the length of *War and Peace.* It is the book you just can't bear to set down or the chapter you must finish before going to bed. When you feel this way, you know that the writer has done a good job of capturing your attention. That's the kind of mesmerizing drama and excitement I want you to create for those funders reading and reviewing your grant proposals. Let's get started!

chapter
ONE

First Steps

Getting Ready for Grantseeking

As any writer will tell you, a lot of preparation usually takes place before any words are actually written. This is also true for grantseekers. First comes the idea, the inspiration. For storytellers, ideas are sparked in their rich imaginations. With nonprofit agencies, ideas can be generated by a variety of people working for or with the agency. Most frequently, it is the executive director or program director who initially conceives an idea for a new program or project that will need new funding in order to be implemented. Or the plan may be simply to keep an existing program going. In either case, the nonprofit agency needs money, and it is decided (generally by the executive director or development director) that approaching grantmakers is a good strategy for securing the necessary funding. But before you or anyone else in your agency begins to draft a grant proposal, additional steps must be taken.

GET PREPARED

It is not unusual for storytellers, and specifically writers, to conduct extensive research before they begin to draft their stories. Some retreat to the library, where they read everything they can about a particular topic. Others try to get

firsthand experience. Authors have been known to take flying lessons, spend a season working on a fishing vessel, or volunteer at a dude ranch in order to prepare for writing their stories.

Grantwriters should be equally prepared. Before attempting to write a proposal, learn as much about your agency as you possibly can. True, we all get busy and overcommitted in our work and daily lives, but spending a day out in the field is priceless. Observe or experience your agency's work firsthand. Talk to the clients your agency helps. Spend a day shadowing your agency's program director, social worker, artistic director, or education coordinator. I guarantee that you will soak up more information than you ever would by visiting your agency's Web site or reading your agency's annual report. Nothing substitutes for being in the field—nothing.

IS THE PROJECT FUNDABLE?

After a program idea has been formulated, the next step is to assess whether the proposed program or project is fundable. The reality is that not all ideas will germinate into fundable programs or projects. It's a bit of a jungle out there in the grantseeking world. Only the fittest survive. So how does an agency determine whether a proposed program or project is likely to be funded? Consider the following questions:

- Is the program or project compatible with the agency's central mission or purpose? (I've seen too many nonprofit agencies chase potential grant dollars by developing programs that were not aligned with their core mission simply to apply for available grant funding. This is letting the tail wag the dog. Do not be tempted to do that. Rather, create only programs that further your agency's mission. Then seek grant funding for those programs. Be assured that if your agency's work serves a critical need, there are foundations and corporations out there willing to provide funds.)
- Does your agency have the expertise and staff resources to carry out the program?
- Can your agency manage the proposed expansion of services?
- Is the proposed program distinguishable from other similar programs in the community? If so, what specific niche will this program or project fill?

- If other agencies are doing similar work, has your agency explored opportunities for collaboration?
- Is there internal support from the board of directors and senior staff for the proposed program?

If your agency can answer yes to each of these questions, then it is well on its way to developing a fundable program. If any answer is no, then perhaps your agency is heading down the wrong path—a road not likely to lead to grant funding.

For example, if your agency does not have the necessary staff expertise to launch a new initiative, it should not pursue grant funding until it has addressed this issue. Consider what could be done to acquire people with the necessary experience and qualifications. This may mean increasing the new program's budget, thereby enabling the agency to hire the additional staff needed. Or it may mean recruiting unpaid volunteers who can be trained to do the work. Another possible alternative is for the agency to explore collaborating with another nonprofit organization that has the appropriate staff expertise.

The point I want to make is that nonprofit agencies are most likely to secure grants when they develop fundable programs. From ideas spring new programs, new initiatives, and these can be bold and inventive, yet they must also present the likelihood of success. If a program seems doomed to failure from its inception, no funder is likely to want to invest in it.

DON'T LET A BAD PROPOSAL DISGUISE A GOOD IDEA

Our challenge is to present to potential funders the most persuasive, creative, and well-written grant proposals that describe the very best programs and initiatives—that is, the ones most likely to succeed in efficiently and effectively delivering valuable services to agency clients. Unfortunately, just as some literary rubbish ends up in the bookstores (and even on the best-sellers list), bad proposals describing bad ideas arrive in the in-boxes of foundation program officers every single day. A veteran program officer, much like a seasoned literary agent, has seen it all—from the very best to the very worst. In fact, most program officers can classify a proposal into one of four basic categories, as Joel Orosz does in his book *The Insider's Guide to Grantmaking* (Jossey-Bass, 2000).

First, there's the bad idea–bad proposal, which is a deadly combination. It's the proposal that presents an idea that is ill conceived, underdeveloped, or just plain unworkable. The proposal isn't even well written, making it all the easier for the program officer to toss the submission into the reject pile. These are easy ones for the program officer to dispense with.

The second type of proposal is the devious bad idea–good proposal. Narratives like this are often the products of professional grantwriters, masters of the fine art of spinning golden words. Masquerading under slick, sophisticated writing lurks a really bad or weak program idea. But with a smoothly crafted proposal, it's harder to recognize it. Yet don't kid yourself—the vast majority of program officers are going to see right through the veil of crafty wordplay. A proposal that falls into this category is not likely to get funded either.

More frustrating are submissions that fall into the good idea–bad proposal category. With these proposals, the gem of an idea truly worthy of funding lies buried under disorganized, sloppy, or terrible writing. Most program officers are willing to make the journey and try to find the treasure, provided they see a flicker of a good, or even brilliant, idea. Sadly, a few won't bother, and thus some truly wonderful programs or projects won't get funded.

Proposal submissions in the final category are of course a joy to behold and read. These are the ones that present a well-developed idea by telling a good story. These are the "10s," the ones that get four stars, the ones that should win the Pulitzer Prize. It should be no surprise that these are the grant proposals that have the best chance of being funded. In a philanthropic environment where the ratio of submitted to funded proposals is often ten to one or twelve to one (with some funders it can even be as daunting as twenty to one), excellence is what you should be striving for.

IS YOUR STORY READY TO BE TOLD?

Not all stories are ready to be told. Grantwriters have to know when they have a compelling, urgent story to tell and when there are serious loose ends to tidy up before pen should be put to paper (or, in today's nonprofit office, before the computer should be turned on). I am talking about those unusual circumstances when the grantseeking process (and, for that matter, possibly all fundraising activities) should be temporarily halted. For in a nonprofit agency's life, there may be times when it is prudent to stop fundraising until the crisis has passed.

What times are these? Whenever the agency's credibility is in doubt and its ability to do its work is called into question. For example, the following situations may require a pause in grantseeking:

- When there is extremely high turnover on the board of directors
- When a seriously difficult executive director transition is occurring
- When the agency has been rocked by public scandal or has received extremely negative press
- When there is inadequate staff to plan and implement the program for which funding is sought

In each of the situations just described (or other such extenuating circumstances that merit a temporary suspension of fundraising activities, including grantseeking), the agency needs to get its house in order before fundraising can proceed. There is a simple reason for this. When making funding decisions, grantmakers look for agencies that are fiscally stable, that demonstrate competence and the ability to do good, solid work, that have steady internal leadership (for example, from the board of directors and chief executive officer), that are respected in the community, and that are trustworthy. Agencies experiencing one or more of the challenges just listed are therefore at an extreme disadvantage when seeking grant funding. Other agencies without these troubling issues present a stronger case for support. And although it is precisely during such trying times that a nonprofit agency is most likely to be in need of contributed dollars, asking for grant support is likely to be frustrating or even futile, and it may even jeopardize future opportunities for funding.

To be successful at grantseeking, you must tell your agency's story from a position of organizational strength.

KNOW WHAT YOU'RE RAISING MONEY FOR

In grantseeking, as with all fundraising activities, it is critical for anyone working on a proposal to know specifically what the agency is raising money for. The financial needs of a nonprofit agency fall into six broad categories. So far, I have referred to only one of those six, which is program or project support. (Note that a *project* is a task—something of limited duration—whereas a

program is something likely to continue indefinitely.) The other five categories of financial needs are the following:

- *Funds for capital or equipment purchases.* This is so-called bricks-and-sticks or bricks-and-mortar funding, which includes funding for things like building or renovating facilities, acquiring raw land, or purchasing large pieces of equipment, such as vehicles, computers, telephone systems, or medical testing devices.
- *Endowment funds.* Think of these as an agency's piggy bank. They're like savings or retirement accounts. Money is prudently invested, and the interest earned is used to support the agency's programs, projects, and general operations.
- *Funds for technical development or capacity building.* Such funds help an agency gain expertise that will enable it to move to the next level. This includes, for example, management, financial, and fundraising training.
- *Seed funding.* These are funds for brand-new start-up agencies. This is crucial incubation money that helps an agency get established.
- *General operating funds.* These are funds that cannot otherwise be placed in a program or project budget and that cover all of an agency's day-to-day expenses, such as salaries, rent, insurance, and supplies.

Grantmakers frequently limit their funding to one or two specific financial needs. A great number fund new or continuing programs or projects. Other foundations award grants only for capital projects. Some prefer to assist fledgling organizations by providing seed funding. A significant number help nonprofits, frequently those they already support with program or operating grants, from the inside by giving technical assistance and capacity-building grants. A few make gifts to establish or increase endowments. And finally, there are those cherished foundations that make unrestricted grants, which can be used to support an agency's general operations.

Be aware that your agency is likely to have multiple financial needs at any given time. Certainly, every nonprofit agency has an ongoing need for general operating support in order to pay its basic bills and to make its payroll. The vast majority of nonprofit agencies will also need funds to support services and programs. From time to time, many agencies will have capital or equipment needs. Matching the right funder with your agency's specific financial needs is extremely important and is discussed more fully in Chapter Two.

The fact that every nonprofit I know needs funding is not surprising. The fact that some nonprofits don't have a clear understanding of what they need funding *for* is. I occasionally get phone calls that go something like this:

EXECUTIVE DIRECTOR: Hi. I'm calling because we need a grant.
ME: For what?
EXECUTIVE DIRECTOR: Money.
ME: For what?
EXECUTIVE DIRECTOR: Money.

You get the point. Executive directors and nonprofit staff generally know they need funding, but they can't always articulate what they need the funds for. And if they can't express the need to you or me, we won't be able to do a very good job telling a prospective funder. When approaching grantmakers, it is essential that we clearly state what the grant, if awarded, will fund.

GET READY TO TELL YOUR STORY

If your agency has a fundable idea to present to potential grantmakers, then the next question to address is whether you are well prepared and personally ready to tell your agency's story.

No matter whether you're an old-timer or a brand-new employee, you should not begin to write a grant proposal until you are adequately prepared. And all grantseekers are better prepared if they know as much as possible about the nonprofit agency they work for and the field the agency works in (such as education, social justice, health care, or the visual arts). As previously noted, I recommend that from time to time you get out of your office to see and experience the actual work your agency does. You may have worked for the same organization for several years, perhaps having held several different positions in the agency, and may already be very knowledgeable. Or you may be new to your agency and perhaps even to the nonprofit sector. If that is the case, preparing a grant proposal is a great way for you to become well acquainted with your agency and the field in general.

This is one of the things I love most about grantwriting: you get to wear many hats! In addition to writer, you are also a reporter and a researcher.

Be a Reporter

To tell your agency's story effectively, you first need information, and to get information, you must often play the role of reporter. In this capacity, you will

frequently find it necessary and appropriate to interview various staff members at your agency, such as the program director, finance director, personnel director, and executive director. Armed with a reporter's notepad, you must get the specifics from these individuals before you can begin to prepare a grant proposal.

For example, suppose that you are a grantwriter working for a nonprofit blood bank in a major urban area; the blood bank is having difficulty recruiting blood donors from the city's largest ethnic population. The blood bank's executive director thinks that to increase blood donations, it would be a good idea for the center to hire an outreach coordinator who can focus recruitment efforts on this ethnic community. The executive director hopes this program will be funded through grants from foundations in the community and asks you to draft the proposal. As a resourceful reporter, what do you need to do?

Well, you'd probably want to begin by interviewing the head of donor recruitment at the blood bank, especially because the proposed outreach coordinator would report to her. You would want to know why it is important for the blood bank to increase blood donations from this ethnic group. Are there cultural barriers that prevent people in this ethnic community from giving blood? You would also want to learn what vision the head of donor recruitment has for the proposed program. With whom in the ethnic community would the outreach coordinator forge relationships, and how? What kinds of written and online recruitment materials may need to be developed? Would these materials need to be translated into another language? How and to whom would such materials be distributed?

These are the types of questions that can best be answered by interviewing agency staff in your role as reporter.

When talking with staff, don't forget those folks in the finance department. You'll need to work with them on the budget that will accompany the proposal. In some situations, the finance department will prepare the budget, which you will then need to review carefully. In others, you will work closely with the finance department in building a budget together. A full discussion of budgets is found in Chapter Eight.

If you worked at the blood center, you would likely first talk with either the center's finance director or the personnel director in order to determine a salary range for the new outreach coordinator and other related program expenses.

In addition to interviewing agency personnel, you might also find it worthwhile to talk with one or more clients of your agency, especially if you are

gathering quotes or testimonials. Often there is no substitute for words spoken from the heart by people who have been helped by your agency. As discussed in Chapter Five, client quotes become the rich dialogue in your proposal story.

Be a Researcher

In addition to functioning as an ace reporter, you also get an opportunity to be a crackerjack researcher. Key facts and figures that will strengthen your case for support do not fall from the sky. Sometimes they are provided to you by a program director or can be found in agency documents (such as prior evaluation reports), but often you must do independent research to find the data you'll need to write a strong proposal. To be an effective and efficient researcher, you should become familiar with online resources that are relevant to your agency's field of work. U.S. Census, county, local government, and chamber of commerce Web sites are good places to start. Googling relevant key words will frequently lead you to other helpful sources.

Returning to our blood bank example, your proposal narrative would be even more persuasive if it included statistics to show the low percentage of blood donations from the targeted ethnic population. Therefore, you may need to do some independent research if this information is not readily available from internal sources at the blood bank. Perhaps your agency's case would be further enhanced if you were able to frame it within a broader geographic context, demonstrating that this is a statewide or even national issue. Additional research may reveal how other blood centers around the country have dealt with the challenge of recruiting more blood donors from specific ethnic groups.

As you can see, being a grantwriter is not one-dimensional. At any given time, you may be a writer, an intrepid reporter, or a thorough researcher. The job of grantwriting will certainly keep you busy!

"TALK" YOUR STORY

As I've already said, I believe that each of us is a competent storyteller. Telling stories is an integral part of our daily lives. And yet telling an agency's story in a grant proposal can seem so daunting. Why? One of the obvious reasons is that most of our daily storytelling is verbal. Frequently, it is the act of writing the story down that freezes us. So how can you take the spoken word and get it written down?

First, turn off that editor's voice in your head. Too often we believe that the written word needs to be more formal or perfect than the way we speak. We begin to write, yet find ourselves saying, "That doesn't sound right." So we stop. We delete. We labor over the same sentence for hours.

May I make a suggestion? To use a popular slogan: just do it. Just write. I call it the "dirty draft." It isn't pretty, but it gets the job done. I put words and thoughts on paper. I write quickly, not pausing to parse every word or mull over each phrase. Sometimes I leave blanks or mark where I want to find a more descriptive or precise word. Sooner rather than later, I have a first draft. Once I do, I can go back and edit, revise, and move copy around, polishing my rough draft into a smooth gem. And that's so much easier than facing the terror of a blank page.

Second, aim to write the way you speak rather than the way you think you should write. We know what we want to say, but too often we feel the overwhelming need to write in a formal, frequently stilted, manner. We choose big words instead of short ones because we believe that they make us sound smarter. We write long, complex sentences for the same reason. In doing so, we run the risk of losing clarity. In my experience, writing more like the way we speak helps keep proposal narratives clear, concise, and to the point. And they will read as if written by a passionate human being rather than a computer thesaurus.

If you still have trouble getting started, try thinking about why you chose to work for this particular agency and about the clients it serves, the work it does, and the difference it makes in the life of the community. Write down your thoughts, your answers. You may be surprised by how passionate you are about the cause, and this is most likely to be conveyed on paper. This is a terrific warm-up exercise before beginning to draft that otherwise daunting proposal.

I suggest that once you have a draft that you are satisfied with, put it aside for several days. Then go back over the copy one more time. Does the proposal answer the questions asked by the funder? Does it flow like a well-written story? Is it well organized? Does the narrative contain drama and excitement? Does it grab the reader's attention with the first sentence and hold it throughout? Until you can answer yes to each of these questions, you have more work to do.

Always make certain that you give yourself enough time to edit and revise. I cannot emphasize this point enough. The preparation (research and fact gathering) that goes into getting ready to write a proposal takes time. The actual writing of a grant proposal takes time. Usually lots of time. Successful grant proposals typically are not prepared in a few hours, days, or even a week. Schedule

Time to Write!

This is a book about writing. It's time for you to do just that, so take out a pen or turn on your computer. This is an exercise I frequently use to open my grantwriting workshops.

I like adjectives and adverbs. By definition, they are descriptive words that give color and texture to our writing. Like seasonings, a few well-chosen words will come together to create a delicious dish (or nicely crafted proposal). Use too many, and you ruin the soup. I like using adjectives and adverbs in grant proposals because they force us to be precise with language.

Here's what I want you to do:

- Using only five to seven adverbs and adjectives, describe your agency.
- No nouns, pronouns, verbs, or articles are allowed.
- You may not use the adjectives "unique" and "innovative." (Every nonprofit agency can lay claim to those descriptors, and they have therefore lost their meaning.)

Think it can't be done? What type of nonprofit organization am I describing with these few carefully chosen words?

- Historical
- Archival
- Educational
- Local
- Kid-friendly
- Acclaimed

What do you think this agency is? (See the footnote at the end of the chapter for the answer.)

Now it is your turn. Time to start flexing that writing muscle.

sufficient time to research and gather information, then schedule even more time to write and revise. In the best-case scenario, allow yourself at least three to four weeks for the whole process.

I've received many calls from frantic executive directors and development professionals asking for help in preparing a grant proposal when the submission deadline is only days away. Under such constraints, there isn't enough time to do the job right. Sadly, I have to turn them down. I won't be able to do a good job, and they won't be satisfied with the outcome when they hear from the grantmaker. So my advice is to plan ahead and give yourself sufficient time for any unexpected delays or problems.

SUMMARY

As anyone who has ever painted a room knows, at least 80 percent of the job is in the preparation. The same can be said for grantseeking, as well as for all fundraising activities. Success is achieved through adequate preparation. Here are the key points on grantseeking preparation that have been covered in this chapter:

- Spend time out of your office and in the field in order to witness firsthand the programs and services offered by your nonprofit agency and to meet the clients being served.
- Determine whether new ideas for programs and projects are fundable.
- Understand what specifically you're raising money for.
- Assume the roles of reporter and researcher when gathering information to be included in a proposal.
- Consider *talking* instead of *writing* your story.

Time to Write! answer: a county history museum

chapter TWO

Research and Relationships

Finding and Cultivating Your Audience

Authors of children's literature don't want their books sitting on the shelves of a bookstore's sci-fi section, and sci-fi writers would be unhappy to find their stories plunked down in the middle of the romance section. That's because storytellers, and in this case authors, want to reach their primary audience: that segment of the population most likely to purchase and read their works. So writers of children's fiction want their titles placed in the children's literature section, and sci-fi writers are happiest when their creative works are located with other books of the same genre.

The notion that writers (not to mention their publishers) want to get their books in front of the right audience translates beautifully to the grantseeking field. To have the best chance of securing all-important grant funding, you must get your agency's grant proposals before the right audience—that is, those grantmakers most likely to fund your project or program. Yet identifying the right audience of potential funders isn't as easy and straightforward as it is for those who write children's literature, science fiction, mystery novels, romance novels, and the like. Therefore, this chapter discusses how to find and cultivate the best audience of grantmakers for your nonprofit agency.

EFFICIENT RESEARCH: THE FOUR FILTERS PLUS ONE

At the time of the writing of this edition, there are close to one hundred thousand foundations in the United States, and that number is expected to grow steadily in the years ahead. There are also hundreds of thousands of corporations

and businesses operating nationwide, many of which have grantmaking programs. In addition, there are countless government agencies (city, county, state, and federal) that make grants.

Given the sheer number of potential grantmakers, how does one efficiently and effectively research and identify the best possible prospects? Research can too often seem like the black hole of fundraising, a bottomless pit that development professionals fall into and can't get out of. It can seem like a daunting and perhaps overwhelming task—unless you have a system for conducting your research.

To streamline your research and make it an efficient, less time-consuming process, I recommend using the "four-filters-plus-one method." By using this method, you will be able to quickly assess whether a grantmaker is a good fit for your agency and to filter out all others.

The first four filters, or criteria, I use to determine whether a foundation, corporation, or government agency is a true prospect for grant funding are the following: subject area, geographic preference, type of financial need, and the typical dollar range of grants awarded. This information is generally readily available in the various foundation and corporate directories (both electronic and hard copy) and may be used to guide your online searches. (Where to go to conduct your research comes a little later in the chapter.) The fifth criterion, or the plus-one filter as I like to call it, is different from the other four because it is not readily apparent from a review of foundation and corporate summaries. The fifth filter involves relationships, those personal connections between your nonprofit agency and a potential grantmaker.

A tip for making research more efficient: review the first two criteria (subject matter and geography) before going any further. If you identify a funder that supports agencies doing the work that yours does, but sets geographic restrictions on its grantmaking, and your agency doesn't fit within the geographic boundaries, then Stop! Don't read another word. You're only wasting your time by reading about a funder that does not fund in your area or does not fund the type of work that your agency does. I'll have a little more to say about this as we go on.

THE FOUR FILTERS PLUS ONE—UP CLOSE

Let's take a closer look at each of these filters, or screening criteria, to see how they can be used to determine whether or not a potential grantmaker is likely to be a good fit.

Subject Area

It should almost go without saying that one of the most important filters is subject area, which describes the field in which an agency conducts its work. Is your agency working in the arena of health care, the arts, social services, social justice, education, the environment, or something else? Funders frequently prioritize their grantmaking by subject area, which will be noted in their guidelines and then reported in the many available grantmaker directories.

Seek to identify those funders with whom your nonprofit agency has an alignment of interest. Accordingly, if you work for an agency dealing with the mental health of seniors, then you should be looking for grantmakers that list mental health, seniors, or both as among their funding priorities. Similarly, conservation groups get matched with environmental funders, schools are best teamed with grantmakers that fund education, a dance group should seek out funders of the performing arts, and so on.

On occasion, I've had nonprofit professionals ask me whether they should approach a funder that doesn't already award grants in their field. Their thinking is that perhaps something different will appeal to the funder. I discourage this approach. It is better to find a match based on similar subject area, because we are grantseekers, not missionaries. We shouldn't try to convert a foundation that has expressed a preference for funding in a given area. Doing so is likely to be a waste of time.

For example, a family foundation that expressly states that it supports the performing arts is not a good prospect for an agency concerned with the mental health of seniors. Approaching this funder on behalf of a senior citizen mental health initiative will be a colossal waste of time and energy. This grantmaker, presumably after thoughtful consideration, analysis, and deliberation, has chosen the subject area it will concentrate on funding (in this case, the performing arts). Consequently, your lobbying efforts are likely to have little effect. Yet I nevertheless hear nonprofit organizations (generally those with little experience in grantseeking) emphatically state that they are going to approach a particular foundation precisely because the foundation has never before funded in their field. And they are determined to convince that foundation to make an exception. In such situations, all I can do is wish these zealots the best.

Geographic Preference

The next filter, or screening device, is the expressed geographic preference of the funder. In fact, coupled with subject area, these are the two most important

filters. Why? In order for a grantmaker to be a legitimate potential investor in your agency, it must make grants in the geographic region where your agency does its work. Suppose you identify a foundation that seems to be a perfect subject-matter fit with your agency. However, this funder restricts its grantmaking activities to a small geographic area that is two thousand miles away, or perhaps just two hundred miles, from where your agency is located. Is there any reason to approach this funder? The answer is no. This grantmaker is not a good geographic fit with your agency.

What this means is that a Los Angeles–based agency addressing the mental health needs of senior citizens should be looking for grantmakers that (1) identify mental health, seniors, or both as a funding priority and (2) make grants in the city of Los Angeles. A foundation which indicates that senior health programs are a funding priority but restricts its funding to the San Francisco Bay Area will be of little help to that Los Angeles–based agency.

Remember that geographic location is of the utmost importance to corporate and business grantmakers. Corporations prefer to fund, and frequently will only fund, in those communities where they are headquartered or have major facilities. The reason for this should be obvious. Companies choose to fund the work of nonprofit agencies in communities where their employees and primary customers reside. They want to support nonprofit agencies where their employees are volunteering or serving on boards of directors. Businesses seek to address local problems or unmet needs that most directly affect the communities where their employees and customers live, work, and play.

You may know that Widgets International is the largest company in the United States and that its annual grantmaking program annually awards billions of dollars in grants. However, if in researching Widgets International you discover that the company makes these grants only in its headquarters city of Lucky Falls, Montana, then you should move on to the next potential grantmaker (unless your agency is lucky enough to be located in Lucky Falls). No matter how large, how generous, or how publicly visible a corporation (or any other grantmaker) is, if it doesn't make grants in the geographic region served by your agency, it's time to move on.

Given the sheer number of grantmakers nationwide, it is crucial to review them as quickly as possible when conducting your initial research, eliminating those funders that are not likely to support your agency. In my experience, I'm

able to screen out all but the best prospects by using the twin filters of subject area and geographic preference first.

Type of Financial Need

After you have reviewed potential grantmakers on the basis of subject matter and geography, the next filter I suggest you use is the type of financial need. Once you've identified a grantmaker that funds your agency's subject area and awards grants in your geographic region, see whether the grantmaker funds the type of financial need you're seeking funding for.

In Chapter One, I discussed how you need to know what you are fundraising for in order to present a compelling story. I noted that there are six broad categories of financial needs, including the need for (1) funds to support a program or project, (2) funds for capital or equipment purchases, (3) endowment funds, (4) funds for technical development or capacity building, (5) seed funding, and (6) general operating funds.

It should come as no surprise that grantmakers often specify the precise types of financial needs they will support. And they often get even more specific than the six broad categories mentioned. Here's a partial sampling of the range of financial needs grantmakers may be willing to support: annual campaigns, documentary films, conferences and workshops, building renovations, acquisitions of real property, fundraising events, raffles, scientific research, scholarships, and stipends.

Given the breadth of supported financial needs, you may wonder whether there's anything some grantmaker out there won't fund. Yes, there is one thing—a deficit. If your agency has overspent its financial resources and its balance sheet is awash in a sea of red ink, don't count on a foundation, corporation, or government agency to bail out your organization. Grantmakers don't provide funding to cover deficits. The reasoning is straightforward: running a deficit is a strong indication that a nonprofit agency lacks fiscal prudence and sound financial judgment, and that it may lack the ability to sustain its programs in the future.

This goes to the heart of agency credibility. When there's a deficit, the agency does not look credible. A prospective funder has good reason to question whether the financially troubled agency will manage the spending of new grant funds any better than it has its monetary resources in the past. When evaluated alongside other grant applicants that can demonstrate sound fiscal management, an agency that cannot balance its books does not stack up well.

This is not to say that nonprofit agencies, just like for-profit businesses, don't from time to time find themselves having financial or cash flow problems. Perhaps the arrival of government grant funds has been delayed, or the agency's roof has unexpectedly started leaking and a new one must be put on, or the agency's rent has skyrocketed. As we all know, not every contingency can be planned for. However, it is precisely for these contingencies that prudent nonprofit agencies set aside some money. They create a cash reserve, a sum of money that can be drawn on when these things happen. These types of rare occurrences, when reasonably explained to potential grantmakers, may excuse a weak balance sheet or a modest operating deficit. But usually only once. Funders want to invest in financially stable organizations, not those in precarious financial shape.

Dollar Range of Grants

The last of the four filters is the dollar range of grants typically made by the potential funder. Why is this important or even necessary to know? Because as grantseekers, we try to match grantmaker capacity with agency need.

For example, let's suppose you are seeking grant support for a multimillion-dollar capital campaign, and you identify a foundation that meets each of the three criteria previously discussed (subject area, geographic area, and type of financial support) but awards grants only in the $500 to $1,000 range. At the beginning stage of a multimillion-dollar capital campaign, you need to secure six- and seven-figure gifts; therefore, you wouldn't put this foundation on your "A list" of potential supporters. Rather, you shouldn't consider approaching this foundation until much later in the campaign, after your agency has already secured its large leadership gifts.

Here's another example on a much smaller scale. Suppose you work for a small, grassroots organization that needs $2,500 for a new project it hopes to launch. You identify a foundation that meets each of the previously described filters; however, this funder makes huge grants, say in the range of $100,000 to $500,000. Your request is probably much too small. This foundation has the capacity to award—and the history of awarding—large, six-figure grants to support large, complex programs and projects. This foundation does not want to review requests for tiny grants, regardless of the proposed program's merit. Instead, consider funders that award smaller, or mini, grants to secure the needed $2,500.

Grant range counts. But be careful when you look at the average grant—as opposed to the range of grants—awarded by a potential funder. Focusing only

on the average grant size can mislead you. For any given period of time, this number can be skewed, particularly if the grantmaker recently has awarded an especially large grant. For example, consider a foundation that typically awards grants in the $30,000 to $50,000 range. This funder's average grant size will be artificially high if it has just made an unusual million-dollar award. Looking at only the average grant size for the time period in question, you may incorrectly conclude that the foundation routinely makes six-figure grants. Examining a funder's typical grant range will usually give you the best indication as to whether your request for funds is a proper fit.

Relationships: The Plus-One Filter

The final criterion you should use in determining whether a funder is a good fit for your agency, the plus-one filter, concerns relationships, those personal connections between your agency and the grantmaker. Compared with the first four filters, which can each be applied based on readily available information in the ample resource materials on grantmakers (such as foundation and corporate directories and databases), the plus-one filter is more difficult to apply. Uncovering relationships that exist between your agency and a potential grantmaker requires a bit more effort. True, foundation and corporate directories and databases, along with funder Web sites, annual reports, and guidelines, will almost always identify their officers and trustees. But what you still don't know is whether these people have any linkages to anyone connected with your agency. Finding out if they do requires two steps.

First, whenever you uncover a potential bona fide grantmaker (that is, one that meets the four qualifying criteria), you should make a list of that funder's officers and directors. After you've done this, the second step is to circulate this list among the key people associated with your agency. Most notably, this means your agency's board of directors, although you should also not overlook other key volunteers and staff members, for they know people too. See if anyone affiliated with your agency recognizes the names of the potential funder's officers and trustees. Better still, find out if anyone has an actual connection to these people.

Many board members profess to be "not well connected." I've heard this many times from several different clients. But it's just not true. The reality is that everyone knows somebody, and not surprisingly, board members sometimes know people affiliated with grantmakers in the community.

One of my favorite stories on this subject concerns a fledgling nonprofit organization that was operating on a shoestring budget of less than $100,000 per year; it was governed by a small board of directors and managed by a part-time office administrator. To jump-start this agency's grantseeking efforts, I conducted some initial research and developed a list of about a dozen potential funders. I then prepared a list of the officers and trustees affiliated with these possible funders and took it to a board meeting for review. Before the group even looked at the list, several members voiced the usual protests about not knowing anyone. With a little of my cajoling, they finally agreed to review the list. And what happened? The chair of the board suddenly exclaimed that she not only knew the president of one of the listed foundations but that he was also her neighbor! Hallelujah! A connection, a linkage, was uncovered. The postscript to this story is that after a few conversations between the board chair and the foundation president, the agency was invited to submit a proposal and was ultimately awarded a $10,000 grant!

I can't guarantee a satisfactory outcome like this every time; however, you won't know what relationships exist between your agency and a possible grantmaker unless you inquire. Developing a list of foundation officers and trustees is a good place to start.

HOW MUCH MONEY TO REQUEST

Executive directors and development directors often ask how much money they should request from a particular funder. Suppose that a community foundation normally makes grants in the $5,000 to $50,000 range. Should a first-time applicant request a safe $5,000 or "go for broke" and ask for $50,000? To properly answer this question, it is important to keep in mind that first-time applicants are trying to establish a relationship with a new funder. And you should be aware that the first grant is the hardest money to get from a grantmaker. Therefore, my general rule of thumb is not to be too aggressive with a first-time proposal submission. Ask for an amount somewhere in the middle of the range. It may even be a wise strategy to go in a little lower. Once your agency has an established relationship with a grantmaker, it is easier to engage in a dialogue with that funder about increasing the amount requested in a renewal application.

Having told you my strategy for determining the appropriate amount to ask, I am honor bound to report that I once worked with an executive director who

takes a dramatically different approach. He always asked for the highest grant award possible, hoping to catch the "big one"—and he was successful some of the time. Although he didn't always get many grants, those he did secure were often big. Would he have been more successful in terms of quantity if he had asked funders for a more modest sum? It is impossible to say. But what this illustrates is that seeking and securing grants is an art, not a hard science. As this book attempts to demonstrate, certain grantseeking techniques and methods work better than others. Yet there are points in the whole grantseeking process where the best you can do is follow your inner voice, your intuition. Mine tends to lean toward a more conservative approach, whereas this executive director follows a more aggressive path. And neither of us is completely right or wrong.

HOW LONG YOUR GRANTMAKER LIST SHOULD BE

Like a miner panning for gold, a grantseeker uses the four-filters-plus-one method to find the golden nuggets, those funders that are most likely to fund your agency and its work. How many potential funders will you be able to identify? The short answer is: it depends.

How many bona fide grantmakers you will uncover depends on many factors, such as where your agency is located, how long it has been in existence, and whether the subject matter is currently popular with funders. Certainly, nonprofit agencies in large urban areas will have more possibilities than agencies in less-populated rural communities. Well-established agencies, those that have been serving their communities for several years, are also likely to have a longer list of possibilities simply because they know the funders and the funders know them. Lastly, it is a reality that grantmaker interest in specific causes waxes and wanes over time. If a particular cause or area of interest has the attention of the funding community at a given time, then agencies working in that field will probably find more potential supporters.

I advise nonprofit agencies to look for quality, not quantity, when researching potential funders. A list of "only" six or seven strong potential grantmakers is fine. A list of one or two dozen names is even better. Be cautious if you end up with a significantly longer list than that. If you do, you're probably not stringently screening prospects with the four filters, and you may not be filtering out enough unlikely prospects. Chasing after long shots will not only lower your success rate but will also soak up valuable time and energy. Most nonprofit

professionals, and this includes executive directors, development directors, and program staff, already carry a full plate of work. Be careful about how much more you add to that pile. Strive for efficiency when doing your grant research because this will lead to grantseeking effectiveness.

HOW TO FIND THE GRANTMAKERS

In the first part of this chapter, I provided you with a process for conducting your funder research. Now I want to give you some suggestions on where you can go to undertake your research endeavors.

The Foundation Center Libraries

If you are fortunate enough to work in close proximity to one of the five resource centers operated by the Foundation Center, run, don't walk, to the nearest one! Currently, the Foundation Center houses its national collections in New York City and Washington DC and has field operations in Atlanta, Cleveland, and San Francisco. At each of these resource centers, grantseekers have free access to the center's own publications and resources (including its excellent grantmaker directories and electronic databases), as well as to thousands of books, periodicals, and other research materials related to foundation and corporate giving. The Foundation Center also has a very helpful Web site (the address at the time of this writing is www.fdncenter.org).

If you don't live or work close to a Foundation Center library, don't despair; the Foundation Center also works with a network of nearly four hundred cooperating libraries nationwide. These libraries, which include nonprofit resource centers, public libraries, and community foundation libraries, offer grantseekers most, if not all, of the basic research materials you'll need.

The Internet

I joined the nonprofit field before the dawn of the Internet era, back when I used to traipse to a library to pour through thick reference guides to do funder research. The Internet has dramatically changed the way we conduct our research by putting much of the information we'll ever need just a keystroke away. More and more grantmakers, be they foundations or corporations, have Web sites that contain guidelines, annual reports, and lists of prior grantees. If you have a funder in mind or know its Web address, you can easily get to this online

information. A greater challenge is to identify new bona fide potential funders by searching the Web.

It takes skill and patience to craft a good search. You can use Boolean criteria (AND/OR) for searches on the four filters we've discussed. For example, you can search for funders of a specific subject area in a particular geographic region. Or you can search for funders that support certain types of needs (for example, capital, general operating, scholarships) for certain types of causes (social justice, arts, education, health care, and so on).

My personal preference is to begin by using Foundation Center reference databases and developing an initial list of potential funders. I then visit the Web sites of every funder on the list, provided it has a Web site. (A number of grantmakers, even the smaller family foundations, have learned that a Web site will save them the time and expense of having to respond to telephone inquiries or letters requesting guidelines and deadline information.) At this point, I try to expand my universe of potential donors by undertaking a broader Internet search. I know that I am using appropriate search words if the funders I've previously identified come up in the search.

Nonprofit Agencies Doing Similar Work

Other nonprofit agencies in the field that are doing work similar to your agency's are a wonderful but frequently overlooked resource. Why are they a good resource? Presumably, these nonprofit organizations receive funding from grantmakers that fund in a particular field of interest. Therefore, it is probable that these funders would be interested in also funding your agency.

How can you find out who is funding these other agencies? Review their donor lists! This is public, published information, often readily available on the agency Web site, in agency newsletters, annual reports, and other publications. Many nonprofit agencies, especially museums, theaters, schools, hospitals, and others whose physical sites include public spaces; also acknowledge their major donors with donor walls, plaques, and the like. Do you notice these when you visit? You should, because you can bet that many of your colleagues are paying attention to what foundations and corporations are funding your agency!

On this subject I have a humorous story to share. It's about an ingenious donor researcher working in the development office of a major public university. A new building had recently been completed and dedicated at his school's cross-town rival, a prestigious private college. The researcher wanted to make certain

that he was up-to-date on his knowledge of which grantmakers were funding capital projects for higher education. So he took a "field trip" across town to visit the new building and was duly impressed by the dignified donor wall located in the lobby. But there were so many names that he feared he'd be there all day jotting them down. So this clever development professional took out a camera! He snapped a roll of film, had the film processed, and had the photos enlarged so he could read the funder names. I still admire his genius.

Publications and Other Media

Nonprofit periodicals, local newspapers, and, more rarely, the electronic media are other possible sources for information about who's funding whom. Try to read, or at least scan, as many relevant publications as is reasonably possible. For-profit businesses are especially interested in seeing that their good deeds get publicity. Thus it is not unusual for a newspaper, particularly a neighborhood paper or one in a smaller community, to run a "grip and grin" photo. You know—the one where a corporate representative is presenting an oversize check to a local charity. In recent years, some newspapers have added a nonprofit section as a regular feature. Society columns, besides providing gossip fodder, are another place where good deeds, which include corporate as well as individual largesse, are recognized. So read, read, read!

Your Professional Network

Another often overlooked resource are our friends, relatives, and professional colleagues. People, especially those working in or with the nonprofit field, can be a great source of information. By nature, most fundraising professionals are extroverted folk, and we enjoy getting together with colleagues at professional meetings, conferences, workshops, and symposia. But whether you're an extrovert or an introvert, the fact remains that a lot of useful information circulates at these events, and unless you're there, you won't hear it. So make certain that you attend those appropriate professional and community functions. If you do, don't be surprised if you hear a tidbit like this: "Say, did you hear that the Children's Sports Institute just got a $75,000 grant from the Community Foundation?"

RECRUITING OTHERS TO HELP YOU

By now you might be wondering if it is really possible for one person to do all the work that goes into researching potential grantmakers. If you don't think so,

well, you're absolutely right. It's really not possible for any single individual to do it all.

You need to do what you can, what is humanly possible. I recommend that you recruit others to assist you in the search for potential grantmakers for your agency in order to expand your capabilities and reach. Each person who is closely connected to your nonprofit agency—whether on the staff, on the board of directors, or working as a volunteer—can also serve as the agency's eyes and ears. Engage these folks in the research process. Encourage them to read other nonprofit agency newsletters and annual reports, scan the local papers, watch the evening news, attend various community events, and listen to what others in the community are saying about funding opportunities. If you are the professional grantseeker at your agency, suggest that they report back to you whenever there's a "hot tip" about a new potential funding source. As an intrepid reporter (remember how you play that role when ferreting out background information for preparing a proposal?), once you have a lead, you can take over and do whatever further research is needed.

I can hardly overemphasize the following point: the process of grantseeking, including funder research, is an ongoing one. You cannot complete the research task in an afternoon or even a full day. The grantmaking environment is simply too big and too fluid. New foundations are continually being established. Existing ones change their giving priorities. New corporations move into the area. Old businesses close or leave. Government funding allocations change as new policies are created and laws are adopted. In this ever-changing, dynamic funder universe, there's always new information to acquire and assimilate. That's why grantseeking, and especially funder research, is a year-round activity.

WHAT TO DO WITH YOUR "SHORT LIST" OF GRANTMAKERS

For nonprofit agencies that are just beginning to seek grants, the objective is to develop a realistic and manageable list of potential grantmakers. As I've already noted, a list of one hundred or more names is probably neither. A more useful list will probably be composed of a dozen or two names. Please keep in mind that this is just to give you a rough idea of what you're striving to develop. If you uncover thirty-five honest-to-goodness prospective funders, that's terrific. And if you identify only six grantmakers, that's okay too. It's not the quantity as much as it is the quality that matters. You want to find the best possible, most likely grant-funding sources that you can.

If you work for an established agency that has been in existence for several decades, then you probably already have a core list of grant funders. These will include current supporters, as well as those foundations, corporations, and government agencies that have funded the agency in the recent past. Your objective in this case is to add new names to this pool of grantmakers. Through your research efforts, it may be realistic to identify only one, two, or perhaps half a dozen potential new funders. Once again, it's not a numbers game in which the highest score wins. Rather, success in grantseeking is built on the quality of the prospects.

Regardless of whether you are working for a brand-new start-up organization or a well-established community institution, once you have a "starter list" of the most likely grantmakers, the following steps come next:

1. *Obtain the funder's most current guidelines and grant application.* In today's Internet age, this is easier than ever. A great number of foundations and corporations—probably the majority—now have a Web presence, which means you can visit a funder's Web site to view guidelines and download an application. For an ever-increasing number of funders, you may be able or even required to apply online.

2. *Read and review the funder's guidelines carefully.* As most of us know, the devil's always in the details. Nowhere is this truer than in grantseeking, and particularly when you are trying to figure out all the technical requirements that need to be fulfilled in order to get a grant proposal submitted. There's the all-important deadline. And if you are submitting by mail, you need to know whether this means a postmark date or the date of actual receipt of the proposal by the funder.

Electronic submissions frequently require strict attention to space limitations and formatting requirements; with paper submissions, you must be concerned about limitations on the length of the proposal, what type size to use, how many copies to enclose, what attachments to include, and so on. Generally, all your questions about such matters have been considered by the grantmaker and are answered in the guidelines—if only they are read! So read carefully.

If after reading the guidelines you are still in doubt about a particular detail, what should you do? First, if possible, contact the funder by either e-mail or telephone to clarify your understanding. If you are unable to reach the funder (remember that small family foundations often do not have any staff

members to respond to these requests), then you'll have to rely on your own good judgment.

3. *Review the funder's most recent IRS Form 990.* The 990 is the informational tax return that all nonprofits (including foundations) are required to file annually with the IRS. This is a public document, and the Internet has enabled 990s to be posted and easily accessible (for example, at the Guidestar Web site at www.guidestar.com). The 990 provides a wealth of information about a funder, including its total assets (in dollars), the total amount distributed, a complete list of grantees and awarded amounts, and a list of trustees or directors. Reviewing this information will help yield a more complete profile of the grantmaker you want to approach for funding.

4. *Prepare a yearlong grants calendar.* The grantseeking process is a year-round activity. Given all the responsibilities of a grantwriter and to help make sense of what otherwise could be chaos, I strongly recommend creating a grants calendar, which you can put on a spreadsheet relatively easily. A grants calendar doesn't have to be fancy, but it should be a useful tool that keeps you mindful of upcoming proposal deadlines and the status of your agency's grantseeking activities.

At minimum, a grants calendar should list which funders your agency plans to submit proposals to, the amount of each request, and the specific program or project for which you are seeking funding. I've also found it useful to include a place for additional comments, especially regarding the status of the submission. Often, I also add a column to list the funder's trustees and officers and to note any personal relationships between the funder and agency, as well as a column to indicate the priority ranking of the prospects ("A's" being those I will apply to first; followed by B's, which will be approached only after all of the A's have received proposals; and finally the C's, who are the last to be approached). Exhibit 2.1 shows a format for a basic grants calendar.

Cultivating an Audience

You have a list of prospects organized in a grants calendar—now what? Before you start writing, I suggest that you or someone else from your agency familiar with the request (such as the program director who will manage the program) call the funder if at all possible. Some funders readily encourage, or even require, phone calls from would-be applicants. If that's the case, consider this an opportunity to

Exhibit 2.1.
Sample Grants Calendar Format

Name of Foundation	Fundable Program or Project	Dollar Amount of Request	Submission Deadline	Proposal Status and Comments

tell your story in the oral tradition. Be well prepared. Have close at hand all the information you may need so that you can easily refer to any key facts and figures. Be ready to answer questions. Listen carefully to what the program officer has to say. These conversations can help shape your request and guide you through the application process.

Keep in mind that not every funder welcomes phone calls and not every program officer returns calls. If you find that after leaving three or four messages you haven't heard back, then it is probably safe to conclude that you aren't going to. You'll have to proceed without the benefit of advice from a real person at the funder's office.

Time to Write!

This chapter has focused on researching, not writing. But because this is a book principally about writing, it's time for you to do just that, though admittedly this isn't the most creative of assignments. If your organization does not yet have a grants calendar, I want you to create one right now.

Using Connections

Earlier in the chapter, I noted that identifying any personal relationships existing between your agency and a funder is important. Sometimes they are essential, as in those situations where a foundation does not accept unsolicited proposals. Most likely, you'll need a personal connection with the funder in order to be invited to submit your request. Don't waste your time without one, or your proposal will just end up in the circular file.

When personal relationships exist, they are frequently between one of your board members and a trustee at a foundation. Such connections are golden and should be treated as such. For example, a board member with linkages to a foundation may be able to facilitate an introductory meeting or telephone call between your executive director and a foundation program officer. Or, by talking with a foundation trustee, your board member may be able to gain valuable insight into the foundation's current funding preferences and obtain tips for how you can best present your request. Or the board member may serve as a valuable advocate in championing your agency's case for support to the decision makers at the foundation. These are all examples of how a personal connection can be positive and helpful.

Yet there are pitfalls to watch out for. The most serious is allowing a personal relationship to circumvent the funder's established procedures. Guard against this. Program officers have a job to do, and they must follow internal procedures that direct how proposals are reviewed and funding decisions are made. These procedures must be respected.

Accordingly, if a board member from your agency knows a foundation trustee, it is not advisable to approach the trustee with your proposal and bypass the program officer. Rather, it is a better practice to honor procedure by being transparent about any personal connection between agency and foundation. In your cover letter, mention the board member's relationship to the trustee, and copy the trustee. If you have an opportunity to speak directly with the program officer, be candid about disclosing this relationship. Keeping all parties informed is always the best policy.

There's a downside to not doing so. When personal relationships are used to secure grant funding, program officers are being sidestepped, and their authority is undermined. Under such circumstances, a program officer is certain to be upset, and rightly so. This is not the kind of impression your agency wants to

make with a program officer, especially one who will be monitoring your agency for the duration of the grant period. It could make for a long and uncomfortable year. Furthermore, a program officer may remain with a foundation long after a trustee has left. You may be dealing with the program officer for many, many years. Or the program officer may leave one foundation and take a position with another, carrying negative feelings with him. Under either scenario, wouldn't you rather have a friend?

BUSTING A POPULAR MYTH

Sometimes the adage is true: it's not what you know but who you know.

Having said this, one of the biggest myths in grantseeking is that you *must* know somebody in order to get funding. This simply isn't true. Every day, nonprofit agencies receive grant funding from grantmakers without having the benefit of an inside connection. These agencies are funded because they are credible, they provide valuable services to meet community needs, and their proposals present a strong case for support.

For the majority of agencies, the submission of a proposal or letter of inquiry is the first step toward developing a relationship with a grantmaker. This is especially true in large urban areas, where thousands of nonprofits compete for limited grant funding. With time and staffing in short supply, grantmakers are unable to become familiar with all potential grant applicants. In many instances, a funder will first hear of an agency only when that nonprofit approaches the funder for a grant. In contrast, it is not unusual for grantmakers and grantseekers to be very well acquainted with each other in smaller towns and cities.

SUMMARY

Delivering your compelling story to the right audience of potential funders is essential in successful grantseeking. This chapter discussed how to identify the best funders for your agency and how to cultivate that relationship once identified. Key suggestions included the following:

- Use the four filters plus one (subject area, geographic preference, type of financial need, dollar range of grants, and personal relationships) to screen out all but the most likely funders for your agency.
- Be thorough in conducting your research, using such resources as the Foundation Center library, community foundation libraries, public libraries,

the Internet, other nonprofit agencies doing similar work, newspapers and other publications, and your professional network.

- Recruit those persons affiliated with your agency—staff, board, and volunteers—to assist you in the process.
- Keep in mind that identifying your potential audience is a year-round activity.
- Remember: you don't always need to know someone to get a grant.
- Recognize that personal relationships between someone associated with your agency and a funder are golden and must be treated with respect.
- Guard against skirting a funder's established procedures for submitting a proposal.
- Know that in many circumstances, the relationship between a nonprofit agency and a funder begins with the submission of a grant proposal or letter of inquiry.

chapter
THREE

The Short Story

Writing Letters of Inquiry

I have made this letter longer than usual, only because I have not had time to make it shorter." These words of the seventeenth-century French philosopher and mathematician Blaise Pascal (often misattributed to Mark Twain), can be rephrased and applied to the grantseeking field: I didn't have time to write a letter of inquiry, so I wrote a proposal instead. If proposals are like novels, then letters are like short stories. Whereas novels can be long, meandering, and filled with subplots, short stories must be tightly compact, using an economy of words. Admittedly, it's challenging to keep your narrative brief. Every word counts. This chapter will demonstrate how to write a concise, persuasive, and successful letter of inquiry.

PURPOSE OF THE LETTER OF INQUIRY

Some grantmakers prefer to read a shortened version of your agency's story before receiving the full-length tale, and will invite you to submit a letter of inquiry (also called a letter of intent or LOI) prior to the submission of a full proposal. Think of an LOI as the first hoop you must jump through. The purpose of an LOI is to serve as a screening device for the funder. Grantmakers use LOIs to filter out requests that do not fit within their giving priorities or are otherwise not likely to be funded.

Using LOIs to screen applicants is a sound timesaving practice for both grantmakers and grantseekers. On the grantmaking side, a funder only needs to read a brief version of the agency's story in order to decide whether or not to invite the submission of a full proposal. On the grantseeking side, a nonprofit agency only needs to prepare a succinct letter to start the ball rolling. I know I joked that writing "short" can take more time than writing "long." And although there is some truth to this statement, the reality is that pulling together a full proposal (narrative and various attachments) is a time-consuming process, requiring even more time than preparing a well-crafted LOI.

An LOI is very brief, typically just one to three pages in length. If requesting an LOI, grantmakers often will specify the desired number of pages. If they don't, err on the side of brevity. Most often, an LOI is written on your agency's letterhead. A funder may ask for an LOI and only an LOI. It is also not unusual for a funder to ask for a few attachments to accompany the LOI, typically a program budget, your agency's annual budget, and board list. Gathering these attachments is never as time-consuming as it is when preparing attachments to accompany a full proposal.

How do you know whether or not to begin with an LOI? If the grantmaker says to, then I always do. Directions regarding how to initially approach a funder are most often found in the funder's guidelines on its Web site. For those funders that don't specify whether applicants should first submit an LOI, I recommend going straight to a full proposal. It is critical to always follow funders' instructions regarding what they want.

THE KEY WORD IS *FIT*

A successful LOI demonstrates that the agency is a good fit with the funder's current giving priorities. A persuasive LOI entices the funder to want to learn more. And the only way to obtain more information about the proposed project is to invite your agency to submit a full proposal.

To prepare a compelling LOI, you must present a fairly well-developed program idea. This is a topic I discuss in Chapter One. Although at this stage you don't need to have every detail fleshed out, the more specific you can be, the more substantial your LOI will be, and the more likely you are to be invited to proceed to the next step. If your LOI is vague, general rather than specific, conceptual rather than concrete, it won't be successful.

How do you demonstrate "fit"? To state the obvious: say so. It is entirely appropriate to tell the funder that you have read its guidelines and reviewed its list of recent grantees and that your agency is in alignment with the types of organizations currently being funded. Straight out. Just like that. But don't just say it. Show it. Describe what your agency is going to do and what it plans to accomplish so that the funder can see that there is a genuine fit. Examples 3.1 and 3.2 are a couple of excerpts that illustrate how to incorporate "fit" in an LOI. Note that the first also appropriately acknowledges the grantmaker's prior giving to the applicant agency.

HOW TO CRAFT A LETTER OF INQUIRY

Like short stories, LOIs have a beginning, a middle, and an end. As demonstrated in Examples 3.1 and 3.2, in the opening paragraph (or paragraphs) of an LOI, you should state why your agency is a good fit with the potential funder and acknowledge prior funding (if applicable). The lead paragraph is often also a good place to tell the funder how much money your agency now seeks and for what purpose.

Further, if other grantmakers have already committed support to the program, be sure to weave that information into your LOI story. Frequently I will list a few of the funders who are most widely known and will thus lend greater credibility to a project. I refer to them as "marquee" funders whose names you want to display in metaphoric bright lights in your proposal, typically in the paragraph discussing the amount of the ask and total cost of the project. As you are probably well aware, the first grant dollars are the most difficult ones for any nonprofit agency to raise. Once an agency secures initial funding, additional funders are more apt to come aboard. That's because when a program already has committed funding, new prospective grantmakers know that their funding colleagues have determined that the program is worthy of support.

State the specific dollar amount your agency plans to request from the grantmaker if your agency is invited to submit a full proposal. Make certain that this amount is within the funder's customary range (which is another indication that the request is a good fit). State the program's overall budget so that the funder can see what percentage (100 percent or some lesser amount) it is being asked to provide. This also makes it clear to the grantmaker whether the requesting agency is asking for a lead or cornerstone gift or for the funder to participate to a lesser degree.

Example 3.1
Letter of Inquiry Excerpt Demonstrating "Fit" for an Adolescent Behavioral Health Program

Dear Trustee:

In the mid-1990s, the Generous Fund was a supporter of the Patterson Adolescent Behavioral Health Program ("Patterson Program") at Rincon Valley Medical Center. We deeply appreciate this past generosity and hope we can renew the Fund's interest in our work with youth (ages 12 to 21) who suffer from severe mental illness. We believe that the Patterson Program is a good fit with the Generous Fund, given the Fund's philanthropic support for human and social services, specifically those programs that help children and teens. Therefore, we write this LOI to tell you about our need to purchase various library, art, and recreational items so that we may better serve our young patients. The total cost of these items is $40,000, and we would request a $10,000 grant from the Generous Fund if encouraged to submit a full proposal.

Example 3.2
Letter of Inquiry Excerpt Demonstrating "Fit" for a Faith-Based Volunteer Program

Dear Trustee:

Given the E. & S. Fisher Foundation's support of Catholic agencies and those that address the needs of the poor, I am writing to tell you about the Jesuit Volunteer Corps: Southwest. If invited to submit a full proposal, we will request a grant of $15,000. These funds will be used to provide support services to 25 young adult volunteers who are working with, and living among, the poor and marginalized in the San Francisco Bay Area. Our volunteers are "on fire" with a desire to make a difference. I hope that the E. & S. Fisher Foundation will provide one of the sparks to make this happen!

What should your approach be if no grant funds have yet been raised? My suggestion is that you acknowledge this reality. In these circumstances, I have used language similar to the following: "We invite your foundation to provide crucial leadership support for our agency's new initiative."

In the next paragraph or two of an LOI, establish your agency's credibility, then briefly describe what the problem is and how your agency plans to respond. You may want to include one or two key statistics. Choose ones that either frame the scope of the problem or give it a context within your community. Next, describe the likely results your agency hopes to achieve. This section of an LOI serves to answer the question, What difference will your agency make in the lives of the people it serves?

At the end of the LOI, thank the funder for considering your agency's request. It is a good idea to provide the name of a contact person at your agency in case the funder has any questions or needs additional information. LOIs should be signed by the agency's executive director, the chair of the board of directors, or both. (In other words, the agency's senior administrator should sign the LOI, and this may be a head of school, dean, or artistic director, as appropriate.) Because your executive director or other senior administrator may not be readily available to respond to inquiries from the funder, consider designating your agency's development director or grantwriter as the agency's primary contact person for follow-up questions.

The preceding paragraphs have provided a structure for crafting a letter of intent. Add vivid, compelling language, and you'll have an effective LOI. Choose your words carefully. Be precise. Be specific, rather than general. And leave a little mystery. You want to provide enough information that the funder will conclude that your request is in alignment with its funding interests, but you don't want to give so much information that you'll have nothing new to say if invited to submit a full proposal. Your goal is to leave the funder wanting to know more, which are the details that you'll be able to include in a proposal.

Examples 3.3 and 3.4 are two well-crafted LOIs that illustrate the points covered in this chapter. The first is from a retirement center discussing its need for a shuttle bus to transport senior residents on errands, appointments, and recreational trips. The second is from an environmental organization concerning species preservation.

Example 3.3
Letter of Inquiry from a Retirement Center for Equipment Purchase

Nancy Krickl
Program Officer
Famously Foods Company Foundation

Dear Ms. Krickl:

One of the life-altering moments for an elderly person is the day that individual stops driving an automobile. Immediately, there is a sense of lost freedom and independence. At The Grove, a not-for-profit retirement community that serves a predominantly low- and middle-income population, we want to provide our senior residents with a transportation alternative that is safe, affordable, convenient, and flexible. Our goal is to purchase a 16-passenger, wheelchair-accessible shuttle bus to serve our 330 residents. The cost of a new shuttle bus is nearly $58,000. To date, we have received $32,000 from foundations and individuals. We now seek the remaining $16,000 to make this goal a reality. Famously Foods Company is a leader in the local business community and is known for supporting nonprofit retirement communities, which is why we write this letter of inquiry.

Currently, residents at The Grove have the following transportation options. Some still own and operate their own automobiles, though the majority do not. Some rely on friends and family. Some use public transportation, and a few use taxis. Yet each of these alternatives has its limitations. Driving is not an option for most of our residents. Friends and family are not always available. Public transportation is limited. Taxis are expensive. A center-owned shuttle bus will help meet a very critical transportation need for our seniors, enabling them to shop, do their banking, visit the library, get to doctor's appointments, attend church services, and go on recreational excursions. We anticipate grouping daily trips geographically to be energy and time efficient.

Longer excursions may take residents to museums and on other cultural outings.

In a recent survey of The Grove community, 166 residents indicated that they would use a center-owned shuttle bus as their primary transportation option if one were available. Of these 166 residents, 92 are nondrivers, and 74 still own and operate their own cars.

The Grove was founded in 1965 and is located on a 14-acre campus that offers four levels of care, from independent living to health care. Our residents range in age from 66 to nearly 105, with the average age being 85. Sixty percent of our residents are low and middle income, and our community is among the most affordable in the region. Consistent with our mission to provide affordable senior housing, private financial support and government subsidies are presently given to 65 residents who live on small pensions, social security, and modest savings.

The environment at The Grove is active and celebrates life. A new shuttle bus will enable our residents to more fully access nearby stores and services, as well as area-wide cultural outings. We hope the Famously Foods Company Foundation will be interested in learning more about our community and our need for a new transportation alternative for our residents, and will invite us to submit a full proposal. If you have any questions or need additional information, please call our Director of Development and Communications, Margaret Hansen, or me. Thank you very much for your consideration of our request.

Sincerely,

Ronald Yee
Executive Director

Example 3.4
Letter of Inquiry from an Environmental Agency for Program Support

Ms. Jean Therrien
President
The Therrien Family Foundation
123 Main Street
Central City, OH 45678

Dear Ms. Therrien:

Because The Therrien Family Foundation is well known for supporting causes that promote species preservation and animal welfare, I am writing this letter of inquiry to introduce you to the work being done by Save the Three-Toed Lizard, a 501(c)(3) organization based in Central City. Save the Three-Toed Lizard is dedicated to preserving this majestic amphibian and to saving its ever-decreasing habitat here in Ohio.

We would like to submit a grant proposal for $25,000 to support our Three-Toed Lizard Awareness and Preservation Campaign for the Greater Central City Area. The budget for this campaign is $175,000, and to date we have raised nearly $80,000, including commitments from the Miller Ecology Fund, Big Bank in Town, and Major Corporation.

Save the Three-Toed Lizard was established in 1981 by dedicated biologists, naturalists, and other volunteers who were alarmed by the rapid loss of lizard habitat due to urban growth and development. For twenty years, our organization has worked diligently to save this precious species and its dwindling habitat through educational programs, lobbying activities, and community outreach. As you may know, the Greater Central City Area is one of the prime breeding grounds for the lizard. However, suburban encroachment threatens to drastically reduce the few acres of breeding ground that remain.

In response to this current threat, Save the Three-Toed Lizard intends to launch an area-wide campaign to raise public awareness of

the importance of the species and its fragile habitat. We plan a multipronged approach, which includes making appearances before local zoning boards and other land use decision makers and preparing public awareness materials (such as public service announcements and fliers). We hope that the Therrien Family Foundation agrees that this is a problem deserving immediate attention, and we hope to be invited to submit a full proposal to tell you more about the proposed work of Save the Three-Toed Lizard.

I appreciate your consideration of this letter and look forward to hearing from the foundation soon. If you have any questions, please contact either our Development Director, Cathy Doligalski, or me at 123-456-7890.

Sincerely,

Justine Moorehouse
Executive Director

SUMMARY

Writing a letter of inquiry can be challenging due to the constraints on length. You must pack a lot of information into just a couple of pages at most. In this chapter, I've provided a structure for organizing an LOI and discussed what information is really important to funders, and why, in reviewing LOIs. The following are key points to remember:

- Submit an LOI when the funder requests one; otherwise you can proceed with a full proposal.
- Think of an LOI as a timesaving device for both you and the funder, and as one step in the grantseeking process.
- Demonstrate "fit" between a funder's priorities and the program for which you are seeking funding.
- Provide enough information in your LOI to entice the funder to want to learn more about your agency and proposed project.