

Ten Tips from a Foundation Board Member

By Sam Stokes

1. Do ask questions if the foundation's guidelines don't supply the information you need: For instance, you may want to ask for guidance on an appropriate amount to request, the foundation's policy on contributing to capital campaigns, or whether the foundation will consider funding operating expenses. You may or may not get a direct answer, but it shouldn't hurt to ask.
2. Try to figure out who in the foundation makes the decisions and pitch your proposal accordingly. Is it the executive director? The board? The donor's attorney? If the likely decision makers don't have technical expertise, avoid filling your proposal with scientific jargon about river ecology.
3. Think about how you can make the foundation decision makers personally knowledgeable and enthusiastic about your mission. A float trip? A briefing? An invitation to a special event? However consider tip 4 as well.
4. Think twice before issuing invitations or making gifts to foundation board members or officers. Sometimes they are welcome; sometimes they are not. Some board members feel money spent on plaques and fancy dinners for donors would better be spent on the program; others are flattered by the attention or believe that attending events where they will learn something about the organization helps them make better decisions.
5. Don't write too much. If the guidelines say two pages, this means the foundation wants you to get to the point quickly. A sure way to aggravate the decision makers is to decrease the type font to 9 point and the margins to ¼ inch to squeeze in a bit more information! If it is a choice between adding a few more specifics and good prose that is easy to read, choose the latter.
6. Do follow the guidelines to the letter. If the foundation requires a 501c3 letter from the IRS as part of the documentation, don't assume it will be ok to send it in a couple of days later. It might, but you could be hurting your chances.
7. Avoid sending in the proposal at the last minute before the deadline. It makes it appear as if your organization doesn't have its act together. Also, you may need a cushion if you encounter a problem. If you have to call the day the proposal is due to say your printer went on the fritz and you need a few extra hours, you may or may not be granted them, but in any case you are likely to lose face as foundation officials roll their eyes about yet another the-dog-ate-my-homework sob story.
8. If you are inviting representatives of a foundation that has funded your organization to a fundraiser, consider waiving the request for a contribution. After all, they have already given. Use the invitation as a way of thanking them. If they want to make voluntary contributions, great, but don't make them feel obligated to do so.
9. Foundation officials are on the lookout for red flags when they read financial statements. A major deficit may make them wonder whether your organization is viable; a major surplus may lead them to decide some other organization is in greater need of their funding. If there is something in your financial statement that is likely to raise questions, include an explanation in your proposal.
10. Finally, if you don't get the grant, be a good loser. Send a gracious letter thanking the foundation for considering your proposal. Wait awhile and then ask your contact at the foundation if there are other aspects of your program the foundation would consider funding. You may learn the directors liked your proposal but, given stiffer competition than usual or less dollars available than usual, they could not give you a grant. Your same proposal may be more competitive next time around.