

Visiting Foundations: How to improve your organization's life and ruin your shoes

By Kevin J. Coyle

It is raining and cold and there is not a cab in sight. Like the proverbial postman making my appointed rounds, I trudge across the Big Apple toward an early a.m. meeting, while the sideways-blowing rain has its way with my suit.

In just a few cab-less blocks I am soaked and cranky and wondering what I am doing in mid-town Manhattan. I walk into the foundation's office and ask to see the woman who runs the place. She greets me warmly, offers a towel and signals me to begin the first detailed program explanation of the day. There are five more such meetings ahead before dinner and four scheduled for the next day. As I sit there wishing for a blanket and some hot tea, my shoes begin to shrink. Still, I keep talking. This is the reality of face-to-face foundation fundraising.

Some experts may tell you that writing a good proposal is the hardest part of raising funds from foundations. Others may say that the greatest difficulty lies in effective prospect research. I beg to differ. I think the keenest test of fundraising mettle is consistently getting your face in front of those who are making the grant-making decisions. I would go so far as to say that your statistical odds of being funded go from just a few percentage points (say 5%) to at least 33% once you have been able to personally visit with a foundation executive (assuming, of course, a decent fit between your program and the foundation's interests).

How can you get into the habit of meeting with funders to discuss funding opportunities and maximize the time you spend in these meetings? Here are a few suggestions:

Get into the right mind set — you are offering an opportunity.

Attitude is everything. Often we hear our colleagues lamenting how abrupt foundation representatives can be - even rude. Such exchanges among grant seekers reinforce the belief that foundation executives are cold-hearted or self-important and treat the money as if they own it (which sometimes they do). This can be a self-defeating mind set.

It is true that foundation officers can sometimes be tough to get through to. You might be, too, if you had dozens of people calling each day and hundreds of proposals to evaluate for an upcoming board meeting. And, not everyone is as courteous to foundation professionals as you might be. Some callers can be very difficult, insisting, for example, that paying off their gambling debts is certainly good for the environment (a real case). Perhaps the best mind-set is that of a patient and persistent professional who recognizes how busy these foundation executives are, but also realizes the strength of the program opportunity which he or she has to offer.

First ask for a meeting — not money.

I recommend that you send a potential funder some basic background on your program and a letter requesting a meeting to discuss specific opportunities. This talk-now/write-later approach is a matter of some debate in fundraising circles.

A few foundations will tell you they do not meet with prospective grantees until they first see a written proposal, but most will be happy to meet first. Most recognize that meeting and discussing programs in detail is cost effective, saving time and sometimes preventing hard feelings. Time and again I have gone into a foundation meeting thinking there was either a great chance or no chance at all, only to find the opposite to be true. Or, the discussions have revealed a willingness to look at an experimental approach when there was nothing in a funder's guidelines to indicate such an interest.

Don't just sit there, get the appointment!

It can certainly be stressful to write to funders asking for a meeting but it is even harder to actually call after your letter has been there a couple of days to see how their schedule is shaping up. A letter alone will probably not prompt a potential funder to call you. The more likely scenario is that the funder will wait to hear from you about a specific time you have in mind. So, you must get up the nerve to call.

There is no magic to this. It just has to be done. I find, for some reason, that it helps me to write out the names and phone numbers in large print and to decide that before the day is out all the calls will be done.

Prepare for your meeting — really prepare.

It is obvious that you should know a good deal about the foundation you are approaching, that you should "do your homework." But the best way to do this, in my view, is not so obvious. I suggest that in looking at the background information you have on the foundation, you pay particular attention to past grants. Their guidelines may say grant-making is mostly restricted to a specific geographic area (and may lead you to feel you still have a chance at support even though you hail from a different location), but the grant list will tell you the real story - that they have not given a grant to another locale in the past three years (and that you are probably wasting your time).

Don't get lost!

Did I mention having good directions and knowing where to go? More than once I have gone to the wrong part of town or waited at an old address. More than once I have discovered that "right down the road" meant 31 miles or that "a hop on the subway" meant 45 minutes on the downtown local. Having good maps, good directions, good estimates of times and distances and allowing plenty of time between meetings is very important and if nothing else expresses good manners and respect for the time of others.

Get the most out of your meeting.

Consider a "three basic projects" approach. That is, don't go into the meeting with just one project you are pursuing. Try out three different projects for which you need support and aim them as closely at the funder's priorities as you can without getting yourself off center from your own goals. The give-and-take of a good discussion with a funder can be very helpful in learning how to describe your work and what projects resonate more than others.

Also be efficient and focused in your verbal presentation. Funders are often very busy so avoid too much of a fireside chat. I like to work from an outline and to make sure I am covering the necessary points and keeping the discussion moving.

Learn to tell your story — vividly.

There are different ways to describe your work. Too often, grant-seekers are caught up in the process and jargon of their work and do not know how to make their efforts vivid and understandable to the uninitiated. You are letting your organization down if you can't explain your work clearly. You may even want to practice by explaining it to a family member or a neighbor who has no background in your subject. My friends joke with me about my insistence that I be able to explain a program to my mother before I take it on the road.

The basics of a good explanation are fairly clear and start with a definition of the problem you are trying to address (pollution, loss of habitat, a poorly conceived policy), followed by a description of how your work will solve the problem. It is that simple. It is even simpler if you use maps, flow

charts or other appropriate graphics that can cut down on your need to paint verbal pictures.

I like to do this through a story of how a program came to be. "We started to look at a certain issue and discovered x." And, go on from there — step-by-step. People like stories and they remember them.

Listen - Listen - Listen.

In order to have a good discussion with a funder you have to be open to discouraging news — they have no funds left, they are changing their priorities, etc. Foundation people are human—they hate to be the bearers of bad news. So listen for clues. "That program may be a little beyond our reach." (Translated: No way!) "That would be a tough fit for us." (Translated: No way, ever!). "I think we could look at a proposal on that" (Translated: You have a great shot!). You get the picture.

Funders are also often willing to give you their best advice on how much support to ask for. This can be very helpful, especially when you are new to the potential source. Don't forget to inquire about how the foundation is doing, and be alert for news on changes in program or staff that might benefit your organization.

Funders also may have some helpful suggestions on how to present or conduct your work that deserve attention. They have seen a lot over the years. Learning to listen to these suggestions has been one of the most helpful outcomes of my own fundraising experiences.

Keep good records.

Take notes during your meeting. Write down important pieces of information, like the fact that the program officer is interested in dam removal, or that his son is an avid kayaker, or that the next deadline is coming up in two weeks. As soon as possible (if you have a laptop, use the time on the plane or train going home), create a legible record for the files of the highlights of your meeting. Be sure to share this information with your development director and anyone else (such as board members or other staff) who has a legitimate interest.

Ask if you can submit a proposal.

Oh yeah! Make sure you ask if the foundation would be willing to look at a proposal. This is what you are there for and your odds of success increase exponentially if you leave the meeting with an RFP (a request for a proposal). I remember more than once leaving a long discussion with a funder and then realizing that I had forgotten to ask if I could submit a proposal.

In conclusion: the hardest part of foundation fundraising is making the visits and getting the "quality face time" you need with funders so they can get to know and love you. It takes discipline and some guts to get the meetings but it is some of the best work you can do to build the financial health of your organization.

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