

DIALOGUE

A Periodic Newsletter for Development Officers

-- Bill Somerville, Editor --

Dialogue is published to help improve relations between funders and development officers. *Dialogue* was started at the request of a development officer. Readers are invited to submit questions. *Dialogue* can be received by US post or E-mail.

Q: In the April, 2000 issue of *Dialogue* "Note" section, page 3, mention was made of donor advise funds. What are these?

A: Public charities such as community foundations offer donor advise funds to persons who want to have a philanthropic "account" from which they can recommend grants they want to make. The idea has now caught on to commercial companies such as Fidelity and Vanguard, which offer philanthropic donor advise funds to their customers.

Q: Is it true that once a foundation funds an organization, the chances of getting annual grants are greater?

A: No. More private foundations are willing to give multi-year grants but most foundations do not do so.
It is true that once you get a foundation grant you have an opportunity to have a continuing dialogue with that foundation and consequently a good chance for another grant over time.

Q: When I want money from a foundation, and one of my board members knows one of the Trustees, I will usually ask the board member to call the Trustee. This once was a major *faux pas*, is it still?

A: The risk you run is the antagonism of the foundation executive because you have just gone over his head.

Q: I work with a number of consultants (marketing, media, direct mail). Would foundations see that as negative?

A: To the contrary. The Packard Foundation now gives substantial money for community foundations to pass on to nonprofits to be able to hire consultants. More and more foundations are interested in human service programs being as effective as possible.

Q: What does R.O.I. stand for?

A: Return on investment or as some funders are referring – social return on investment. Increasingly, younger donors are using such terms in an effort to give a business overlay to their associations with nonprofits. In other words, what am I getting for my money?

Q: **What's the perfect kind of program evaluation?**

A: From the perspective of the funder and what he receives, a good evaluation is a narrative regarding what was funded and how it is doing. Such a narrative should be candid and especially share what went wrong so people can learn from the experience. Such narratives can be sent periodically versus a tome at the end of the year. Also included is a budgetary statement showing how the money was used. If applicable, pictures are very helpful. You should always invite the funder for a site visit (not an open house). Show the funder how you gave recognition for the grant in your newsletter, press release, etc. Stay in touch with the funder.

From Our Readers

www.techsoup.org

Powered by CompuMentor, one of the nation's oldest and largest nonprofit technology assistance agencies, TechSoup.org offers nonprofits one-stop shopping for their technology needs. TechSoup is aimed at the 650,000 small to midsize nonprofits.

Q: **It seems the more paper, the better the proposal. I know you (the editor) personally have fought to change this standard. But what can we do as staff people who desperately need the money?**

A: We're talking about being complete while not being voluminous. One compromise is to write a pithy proposal and if you are worried whether you said it all, add addenda, with a table of contents that gives further data to substantiate your proposal.

Q: **I have proposals pending that have not been responded to or acknowledged. It's as if they dropped into the abyss never to be seen again. What should I do? I've even gone so far as to write to the foundation suggesting that if they aren't interested in us to let me know so I could quit wasting their time.**

A: Follow-up phone calls are always a good idea. You can ask four questions: Did you receive the proposal? Is it eligible for consideration? Is it scheduled for consideration? Is there any additional information you need? You might also invite a site visit and suggest some dates.

Note: All foundations should acknowledge correspondence. David Packard of the Packard Foundation insisted that such acknowledgment take place within 24 hours.

About the Editor

The Editor of *Dialogue*, Bill Somerville, has been in nonprofit and foundation work for 40 years. He directed the Peninsula Community Foundation in California for 17 years. He founded and directs the Philanthropic Ventures Foundation, which started in 1991.

For 14 years Mr. Somerville went to foundations for support of the various programs he managed. Upon his first position with a foundation, he promised himself he would not treat others the way he had been treated by some foundations. It is his belief that advocacy is all-important in foundation work i.e. helping people to succeed. The Philanthropic Ventures Foundation is unique in that it tries new approaches to grantmaking such as no deadlines, no proposals, a 24 hour turn around time for making a grant, giving discretionary money to program directors, initiating programs, finding outstanding people in a given community.

The Foundation tries to 'push the envelope' in terms of new ways to work with the public.

Under funding from the Packard Foundation, the Editor and Philanthropic Ventures Foundation has been supported for 9 years to work with community foundations in an effort to improve their grantmaking. Mr. Somerville has made site visits to over 215 foundations in North America and the United Kingdom. He publishes *Building Community Foundations*, which goes to all community foundations.

Mr. Somerville focuses his efforts on grass roots grantmaking and causative philanthropy wherein the funder can take the initiative and either create a program, negotiate with an agency, or fund outstanding programs. He is quoted as saying "We find people we trust and we fund them."

Questions?

If you have any questions regarding development work, send it in and *Dialogue* will get you an answer.

Past Copies of *Dialogue*, Numbers 1-20 are available as a unit for \$10 to cover the cost of copying and mailing. For a complete set send \$10 to:

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Comments On *Dialogue*

“What good reading. How I wish I’d had back copies months ago. Keep *Dialogue* coming. I’m new to this area and your counsel is so helpful.”

Peggy Budd
The Foundation for Religious Studies in Texas
Austin, TX

“Every single issue of *Dialogue* is concise, to the point, and filled with practical information that you can really use. No matter how busy things are, I always take time to read *Dialogue* and I learn something every time I do! Thank you for working so hard for our development community.”

Marcie Stouh
Legal Aid Society
Redwood City, CA

“Got your latest issue of *Dialogue* today – as always, a great collection of sage advice.”

Sandy Daniels
Johnson County Community Foundation
Franklin, IN