

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: What bothers foundation program officers in dealing with non-profits?

A: One program officer of a large well established foundation listed the following things as bothersome:

- People feeling they and their programs are unique
- Poor preparation for foundation site visit
- In rural areas, leadership is so thin
- Taking many months to get information needed to make a grant decision

Q: What makes for a good foundation site visit?

- A:**
- Have the necessary people present to be able to answer questions
 - Take notes while questions are asked to know how to improve your proposal
 - Ask questions yourself. The purpose of the meeting is to strengthen your proposal
 - Don't get defensive but be candid, sincere, and to the point
 - Ask the foundation person for ideas where you might get additional funding
 - Get further materials requested to the foundation program officer right away

PROFESSIONAL DEVELOPMENT

The Northern California Grantmakers published "Professional Development for Experienced Grantmakers" in 2001. It is the result of focus groups involving 45 people representing hundreds of years of experience in philanthropy plus others who submitted their thoughts in writing. The report is 14 pages and has 193 specific bullet points on professional development.

The report should be of interest to persons in the non-profit field and can be obtained by contacting Janet Bankovich of the Northern California Grantmakers at jbankovich@ncg.org.

Q: What percentage of applications are rejected by foundations?

A: About 85%

Q: Is there feedback to applicants who are unorganized?

A: No, for the most part. The Editor has found that feedback often turns into a training program which takes more time than is available.

Q: What are shortcomings in the application process?

A:

- Not focusing on the requirements of the foundation being solicited
- Assumption is the biggest fault i.e. assuming the reader knows what your generalized statements mean
- People treat the deadline date as the due date. Not so. Get your proposal in early
- The Editor has written a paper “Where Proposals Fail” listing 37 things to look out for. This can be found at www.venturesfoundation.org

Q: If expectations are not met by the grantee what do foundations do?

A: It will be pretty hard to get further funding from the foundation. If there is an honest failure, the grantee would be wise to write up what went wrong and why. Share this with the funder and anyone else so others can learn from the experience.

Q: Do foundations discuss pending requests when an agency has submitted proposals to both?

A: Yes. The two parties might discuss past experience with the agency, the present status of the agency, its staffing, Board of Directors, services it offers. Foundations are seeking insight on how to be more objective in a process where the final decision is subjective.

GOOD READING

“The Meaning of Social Entrepreneurship”

by J. Gregory Dees

Miriam & Peter Haas Centennial Professor in Public Service
Graduate School of Business, Stanford University

For copy via e-mail, contact info@venturesfoundation.org

Q: If we as Development people want to increase our foundation funding, “chasing the money” is a relatively common game. How do we get funded without compromising our values?

A: There is a symbiotic relationship between funders and development people - we need each other. The funder needs good ideas and the development person needs support. Some funders see their work as investing in the community versus giving money away. Hopefully, development people would present investment opportunities versus asking for a grant. In other words, the relationship is one of mutual respect and should be approached on that basis.

Q: How should I respond when a foundation suggests creating a program that they want to see but our agency feels otherwise?

A: Find out what is behind the foundation’s thinking. Why do they want their idea implemented? Maybe there is room for give and take. The Editor feels it is unethical for foundations to tell grantees what to do with the money.

Q: Some foundation staff seem too busy to take a phone call before I submit a letter of intent or proposal. Is this really the case?

A: Try e-mail. Go ahead and submit the letter of intent. Keep leaving messages on the voice mail. Ask the foundation receptionist what is the best time to catch the person in their office or could you set up a telephone appointment.

Q: Sometimes I feel that our healthy endowment prevents a foundation from giving us funding. Is this so?

A: Be up front about the endowment and how it supports your work. Be clear that your work needs more support than comes from the endowment. Present things so that you are proud that your reputation has earned an endowment.

Q: How can we be more successful at getting the money we really need - general operating funds?

A: Make sure that all your programs pay their fair share of overhead (general operations) and that your requests for funds include that overhead.

Q: How can we as development officers make your job easier?

A: No wining and dining. No ingratiating. No pleading. Stay in touch. Keep people up to date on your program’s progress. Invite site visits (not open houses). Share breaking news in your field so the foundation person hears it first.

Dialogue

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PROFESSIONAL DEVELOPMENT OPPORTUNITY

The following announcement concerns professional training without leaving your office. The training is customized and done online through your computer. The Editor has been a trainer on grantmaking and he recommends further training for all professionals.

If you have an interest in classes brought to your office via your computer with the best professional presenters from across the country look into the offerings of SympoZium, the live online training company that provides non-profit experts to teach all levels of development work. The classroom can be your colleagues from the same type of organization, or a mix of nonprofit development professionals who share your interest in improving knowledge and skills. The experts' presentations include materials you read and follow on screen, live conversation with your classmates, and the opportunity to ask the teacher your questions at any time. Check out the web site at www.SympoZium.com or call Helen Monroe, Endowment Development Institute at 760-631-7200 x210 to discuss how you can get started. They are interested in knowing what courses would be of most interest to you, and whether you prefer a class limited to your type of organization, or one open to any development professionals. An email to Helen@endowment.com will get you started.