

# DIALOGUE

*A Periodic Newsletter for Development Officers*

- Bill Somerville, Editor -

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*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.

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**Q: I'm serving on a Board where there is little energy among the members, and not just a lack of energy for fund raising. There seems to be a lethargy that I can't quite pinpoint. Any ideas about energizing the group?**

**A:** Be sure the board members understand the mission of the agency. Often they are not as well informed as one assumes. You need to create passion with board members. Take them on field trips to show them the work they are doing. Meet with members individually and relate to that part of them that motivated them to join the Board. Don't flood them with paper. Make your board meetings upbeat. Don't use "form" agendas. Be sure board members know each other and enjoy relating. Call on board members to help in tasks they know how to do. Keep members informed of the work of the agency, especially outstanding things that happen.

**Q: We've had three executive directors in as many years. I'm worried about how this will look to funders. Any suggestions?**

**A:** It doesn't look good to funders. Something is very wrong. Is the salary realistic? Is the Board hiring a compromise person because they can't agree? Are the job expectations realistic? Is the person expected to 'rescue' the agency? Is the person given independence of action or does the Board micromanage? Is there a sense of trust in the agency? Is the person swamped with Board and committee meetings? Did the Board actually hire a clerk for paperwork and not an executive?

**Q: My organization is currently receiving funds from a foundation that requires a six-month hiatus before reapplying for funding for the same program. This doesn't make any sense to me. Is it that they don't want to fund a program for more than one year. Are they forcing us to find interim funding or fund the program ourselves? What's your opinion about this type of funding and is there any way we can change the foundation's policy?**

- A:** It seems the foundation doesn't want to be a continuous funder and is looking to see if there are other funds available. They are trying to force the issue. One could ask for multi-year funding. Show budget information to the foundation to verify need and ask for three years of year-by-year funding.
- Q:** **Our group is currently trying to figure out the 'magic' formula, i.e. which mushroom, if you will, do we bite to get some attention paid to us in order that we become part of that privileged group that gets invited to submit a grant proposal. Do you have any suggestions as to how that takes place, or who we might contact to find out more regarding how to initiate that process?**
- A:** The five questions below were asked by an agency with a \$14 million annual operating budget. Their concerns are directly related to your question and our answers apply as well.
- Q:** **Our agency is an intermediary for advocating and creating child-care. How can we successfully sell ourselves in this intermediary role?**
- A:** Take people on field trips to see the results of your role, i.e. visit child-care programs. Use pictures to depict the results of your work. Use quotes from individuals who have benefited from your work. Use simple statistics to show the outcome of your work. Make things real. No virtual reality. Don't sell intermediary. Sell the results.
- Q:** **What are the three most compelling points to make in raising discretionary funds?**
- A:** Discretionary money can be spent any way you see fit, i.e. at your discretion. It is not necessarily operating money for ongoing programs. Illustrate to a donor the special opportunities that come forth when discretionary money is used. Show donors how discretionary money allows you to act now and not have to wait. Make the case that with discretionary money small amounts can have a significant impact versus

### GOOD READING

Personal Renewal, by John Gardner

This is a 2 1/2 page paper by a very thoughtful man who was a cabinet secretary, a professor, and an activist. Send us your fax number and we will send you a copy. Fax: 510 645-1892

### IMPORTANT REFERENCE MATERIAL

IRS Publication 1779 on the distinction between employees and independent contractors. One page, available on the IRS website: [www.irs.gov](http://www.irs.gov)

having to wait for money while a problem gets worse, and more expensive to solve.

**Q: What are the key ingredients for a successful resource development committee?**

**A:** Made up of people who have a sense of purpose and the passion to pursue it.  
Keep it small enough to get things done and where members know and trust each other.  
Urge members to do independent thinking and come up with ideas.  
Make the meetings enjoyable; none of this crisis response stuff.  
Do things that stimulate the members like having an outstanding resource person present to them.

**Q: Have you seen an exceptional nonprofit marketing piece or package recently, and what made it exceptional?**

**A:** Have print large enough that older people can read the piece. Have anecdotal items that personalize the agency's work. Have pictures that speak to people. Don't make the piece so long it tries to say everything. Don't have the piece look fancy or expensive. Have the narrative pithy, straightforward, candid, interesting, and upbeat.

**Q: Do you think inclusion in published listings of non-profits (paid advertising) works to attract corporate and business support to an agency?**

**A:** Not necessarily. Such listings have nothing to do with quality of program or staff. What does seem to turn donors on are articles in newspapers about your agency and its work.

From the web-site [www.communityfoundationlocator.com](http://www.communityfoundationlocator.com), published by the Council on Foundations, the following statistics were culled:

There are 922 community foundations in the United States  
582 of them are members of the Council on Foundations.  
482 have female and 428 male executive directors.

## COMMENT ON DIALOGUE

"I always learn something from your newsletter."

United Way Director  
Port Clinton, Ohio

***Dialogue***

Philanthropic Ventures Foundation  
1222 Preservation Park Way  
Oakland CA 94612  
510 645-1890  
510 645-1892 fax

Non Profit Organization  
U S Postage PAID  
Oakland CA  
Permit 962

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