

DIALOGUE

A Periodic Newsletter for Development Officers

- Bill Somerville, Editor -

Dialogue is published to help improve relations between funders and development officers of non-profit organizations. *Dialogue* was started at the request of a development officer. Readers are invited to submit questions for response. *Dialogue* can be received by U.S. mail or e-mail.

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Q: Can you suggest any new ways for us to seek support?

A: Ask for a “Lead Trust Grant.” This is a whole new approach to giving money and is a term created by the Editor. A Lead Trust is where a sum of money is set aside by a donor, actually taken out of his/her control, for a given period of time such as 5, 10, 15 years. The interest from the money is given for philanthropy and the donor receives tax credit. Why not a foundation following this example and setting aside a sum of money, \$500,000 or \$1 million for five years, with the income given to your agency? This has never been tried but if your agency is well established, has a strong reputation, outstanding leadership with staff and Board, and does exemplary work in serving others, then it should be eligible for continuing support such as a “Lead Trust Grant.”

Q: What resources do I have if I feel I was treated with disrespect by foundation personnel?

A: Write to the Editor about it. Write to the Council on Foundation, to the top person, Dorothy S. Ridings, President and CEO, 1828 L St, NW, Washington DC, 20036-5168, www.cof.org. Also write to Allen R. Clyde, Editor, Foundation News & Commentary, clyda@cof.org. Write to your local Regional Association of Grantmakers. The Editor can give you the address. There should be zero tolerance for treating people in an aloof manner.

Q: How can we position ourselves to be more effective in fund raising?

A: Try to get media coverage. Anything from a news article about your interesting work, to a feature story about your executive, to a presentation on television in a public airing slot. Wealthy people read the newspaper. Think up what is interesting, exciting, significant about your work. This is newsworthy. In the San Francisco Bay Area, Comcast has a 5 minute public segment every ½ hour. They broadcast this segment for 1 month and 1 ¼ million people see it. The Editor was on and a donor has written Philanthropic Ventures Foundation into her will after seeing the segment on TV.

Q: More and more foundations are now setting their own agenda and they either only accept proposals that fit within that agenda or they don't even accept proposals; they initiate everything themselves. What to do?

A: All foundations are looking for outstanding ideas and outstanding professionals. If, in some way, you can relate to the orientation of the foundation, try to get in and talk with the staff about it. Be sure the foundation staff is aware of your reputation.

Significance

The common denominator held by all donors, be they individuals, foundations, corporations, whatever, is to have significance with their giving.

Significance means impact and impact, in turn, means something positive happening in the community.

There are various formulas to measure significance, even to give it a score. The Editor does not subscribe to such efforts. Instead, there might be a criteria approach to significance with items that a significant grant should have:

- Have an element of risk to it, i.e. trying a new approach
- Reach out to new population groups
- Be given on a timely basis – when it is needed
- Have trust between the funder and the grantee
- Be possible to see a positive outcome from the grant
- Fund the product of creative/original thinking vs. responding to a crisis

Everyone in the non-profit field should give thought to what is significance, thought that can be defined in writing. Such thought puts one into a much better position to seek funds.

Q: Capacity building grants for small agencies – are they available?

A: Yes. The term being used for such grants is “Operational Effectiveness.” What used to be called technical assistance or management assistance is no longer used, mainly because agencies are reluctant to admit they need help. You are in a better position to get such grants if you can articulate where you need help; in other words, by showing an understanding of the issue that concerns, not simply “we need money to help us get on track.”

Good Reading

Lobbying and Advocacy by Nonprofit Organizations

Snapshots published by the Aspen Institute Nonprofit Sector Research Fund

www.nonprofitresearch.org.

All non-profit executives should be familiar with the rules on lobbying by nonprofits. It is allowable but not to a “substantial” degree. Find out what “substantial” means.

Attitudes and Practices Concerning Effective Philanthropy

Published by the Urban Institute

<http://www.urban.org>

This is a 15-page booklet funded by the Packard Foundation about the workings of foundations which give insight to their operations.

“Surviving the Funding Slump” tries to help nonprofits work effectively with organizations and foundations during this time of cutbacks.

By Dynell Garron, author of “The Funder’s Checklist: An Inside Look at How Funders Evaluate Proposals and Nonprofit Organizations.”

<http://www.funderschecklist.com/>

“LOI Analysis” Dynell’s analysis of a Letter of Inquiry (LOI) provides insight into how funders evaluate LOIs and highlights specific things nonprofits can do to make the best first impression.

Same address as above.

Dialogue

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ABOUT THE EDITOR



Bill Somerville has been in non-profit and philanthropic work for 44 years. He was the director of a community foundation for 17 years, and in 1991 founded Philanthropic Ventures Foundation where he serves as President and Executive Director. PVF is a demonstration foundation practicing unique forms of grantmaking and conducting initiative philanthropy. He has consulted at over 280 community foundations in the United States, Canada, and abroad, on creative grantmaking and foundation operations. In addition to *Dialogue*, he publishes Building Community Foundations, which is distributed to all community foundations. His primary interest is in the creative and significant use of the philanthropic dollar.