

most valuable tools available to you. A wealth of information about the potential grant maker is accessible, including:

- **Amount of money donated to organizations during the tax year:** Determine the total amount awarded. Can your request be funded if approved? Can your request be awarded without limiting awards to other, possibly favored, potential recipients?
- **The organizations and individuals who received awards from the grant maker:** Establish whether your request fits in generally with those who have received awards from the grant maker. Do some awards indicate they will consider requests on the edge of the grant maker's stated goals and objectives?
- **The amount given to each award recipient:** Ideally, your request should fall in the midrange of the list of previous awards. If the grant maker doesn't award amounts in the range you need, you don't have a chance. If they have an obvious favorite recipient that gets the lion's share every year, don't expect it to change.
- **Members of the board of directors:** Use this information to start developing your plan of contact (see **Personal Contact**).
- **What income-producing investments the grant maker holds:** Determine if the grant maker is diversified in its investments or holds a majority of the income-producing assets in one entity. This could indicate undue influence by a person or organization that may look unfavorably on your request.

An organization's 990 can be accessed through the Internal Revenue Service's website and through sites such as the Foundation Directory Online's Foundation Center 990 Finder (see **Research Your Target**, p. 1).

### Match Your Need to the Grant Maker's

Very simply, if your need and the grant maker's goals and objectives don't match, there will be no award. Matching both sides of the equation is one of the most critical parts of the grant request process. When researching a grant maker, check the following:

- **Who gets awards?** Does your organization fit the real-life profile of the grant maker's area of interest, even if the grant maker's stated criteria are a bit different? Does the grant maker appear to stay within their stated goals and objectives, or do they appear to be willing to consider projects that are somewhat outside their norm?
- **Are past recipients similar to your organization?** Research past award winners and find the similarities. Contacting a few previous award recipients may help you get a better picture of the grant maker and their view of proposed projects.
- **Does the grant maker have the funds to fulfill your request if awarded?** If they don't have the budget to cover your request or if the awards from past years are not in the amounts that would approach your need, you're likely out of luck.

## Letter of Inquiry

Most of the time, the **letter of inquiry (LOI)** is the first contact point in a grant request project.

### Style & Substance

- **LOI on paper:** Should be no more than three pages long, on high-quality paper with matching envelope, and well organized with no spelling or grammatical errors; use a USPS stamp instead of machine or computer postage, as a machine-stamped envelope may be mistaken for direct mail and discarded.
- **LOI online:** Prepare draft off-line; no spelling or grammatical errors; work within the word limit if specified; attempt to organize and present as close to an LOI on paper as possible.

### What to Include Online & Off-Line

- **The writer's identity:** Unless already established, introduce yourself as if meeting in person. Briefly state your connection to the organization.
- **The organization being represented:** Clearly state the name of the organization and if it is a division or otherwise part of an umbrella organization. Make clear all organizational connections and affiliations.
- **A brief history of the organization:** This should be two to three paragraphs maximum. Include why, where, and how the organization was established.
- **The need:** State the need as an overview with specific but less-detailed corroborating data than a proposal, as requirements dictate and with space permitting.
- **How the need will be addressed:** Include an overview of the plan to address the need with some specifics as space permits, leaving the bulk of the details for the proposal. Indicate if the project is "shovel ready" if it is a brick-and-mortar undertaking or if there is a plan in place to start and operate a social service or intangible project shortly after funds are received.
- **The request:** Detail and briefly explain the specifics of the amount requested. Break down the need into general categories if the request has some complexity to better illustrate what is involved in the request to the reader.
- **Thanks for time and attention:** Let the reader know you appreciate him/her taking the time to read and consider your request.
- **Signature:** Include author's name, title, and signature, unless organization policy requires the director's signature.

### What Not to Include

An LOI is not a full proposal. It is only a request for permission to submit a proposal. Cluttering the request can send it to the "round file" (i.e., the trash) quickly. Do not attach pictures, charts, videos, or anything that distracts from the basic request. Keep it simple.

### How to Identify Yourself

If you are a secondary party, such as a grant writer, be clear and up front about it. Indicate you've been engaged to develop sources and make requests for the organization. Clearly state how you are compensated (e.g., staff member, contract work). If you are the director or otherwise hold a position in the organization, indicate this clearly as well.

### Sending LOIs

- **Be selective in your approach.** Narrow the field to those grant makers your organization has the most in common with and that are most likely to identify with your request.

- **Individualize requests.** Make the request specific to each grant maker approached.
- **Select no more than 15–20 grant makers to approach at maximum.** Ten or fewer is better. If all requests fail, select more to approach and begin again. Remember, it only takes one yes to get the process started.

### No "Shotgunning"

Shotgunning is the practice of sending out 200–500 form letter LOIs to see if anyone will consider your project.

- This practice will quickly mark you within the grant-making community as a nonprofessional and hints of dishonesty and deceptiveness.
- Shotgunning will tag your organization as unprofessional and unwilling to take the time to treat each grant maker with respect and courtesy.

### Online LOI

- **Make the most of sometimes limited space.** Draft your LOI in a word-processing program that provides a word count. Work with the draft until it fits the required space, then copy and paste. Save a copy for your records.
- **Always follow the rules as specified.** Failure to comply may lead to your LOI being discarded.

### Stamped & Mailed LOI

- **Appearance:** The LOI should be in either a high-quality paper business letter envelope or a similarly high-quality 8½" x 11" envelope; no special markings, designs, or pictures should adorn the envelope—doing so makes the request appear unprofessional even before it is opened.
- **Stipulations:** Pay attention to rules regarding size, thickness, or other requirements as stated. Failure to do so may result in immediate disqualification before your LOI is opened.

## Personal Contact

### Making the Initial Approach via Personal Contact

Rarely, it may be possible to explain your request in person, by telephone, or via email exchange. When this occurs, be prepared to:

- Explain your program, giving an overall picture to start.
- Give as many details as possible without overwhelming your contact. Make an effort to let him/her ask questions and attempt to let him/her drive the conversation in determining how your request fits the grant maker's goals.
- Explain what you want to accomplish with your program, including how it will benefit the community, your organization, your clientele, etc.
- Be up front and straightforward, but do not oversell—it will come back to haunt you.
- Let your contact know how much your cost projections are for the project and whether they are estimates or from actual bids. If they are estimates, give an estimated margin of error for the figures.
- Ask permission to submit a proposal. This is the sale close. If you don't get permission, you go no further.
- Send a follow-up letter to thank the contact for his/her time and offer to answer any further questions.

### Personal Contact as a Follow-Up to an LOI

First, determine whether this is a good strategic move.

- **The answer is yes if** personal contact is allowed. This also depends on the size of the grant maker. Personal contact can be more beneficial with a larger grant maker. A follow-up phone call, email, or letter can help bring the LOI to the top of the pile for consideration.