

- The answer is **no** if personal contact is specifically prohibited. If there is a question about contact at all, it can mean the death of your request on the spot.

Make a Good Impression

When making contact with a grant maker regarding your request:

- **Be friendly and positive but not overly so.** A "good ol' boy," backslapping approach is generally not well received. A professional, business-oriented attitude is.
- **Quickly get to the point.** State the purpose up front for your contact after establishing who you are and the organization you represent.
- **Ask the contact if there are any questions.** Also ask when a decision might be made on your LOI request.
- **Do not waste the person's time.** No long stories and no discussing family or other non-request-related subjects. Extraneous conversations have no bearing on a grant maker's decision to go forward with your LOI request and may hurt more than help.

Waiting

- This is part of the process. It takes time for many grant makers to sift through requests, especially near and after published deadlines for LOIs. Most reviewers want to give serious consideration to each request. This takes time.
- Generally, the bigger the grant maker, the longer the time for a response. Occasionally, responses can take as long as six weeks from the original mailing date. One to three weeks is standard.

What to Do While Waiting

- Determine if there is anyone associated with your organization who has direct access to grant-maker personnel through personal or business associations. Use those contacts if appropriate.
- Begin gathering information and materials likely to be used in a formal proposal. If this request doesn't work, another likely will. You'll need to be ready to start when you get the go-ahead.

In-Person Presentations

When a large request is made, a grant maker's board of directors may request an in-person presentation. This is to help them understand the details of the request and learn more about the organization and how it fits with the goals of the grant maker.

The Presenter's Appearance

It is important to look as professional as possible when making an in-person presentation. Many grant-maker board members have business backgrounds and expect a business-savvy approach to the request.

- **Do not try to look poor.** Even though you may be representing a nonprofit, this is not the time to look poor. Board members will relate to you in a more positive manner if you seem like them.
- **Be professional.** Appearance and style need to convey credibility, competence, intelligence, and confidence.

Showing Why Your Needs & the Grant Maker's Goals Match

- What do your organization and the grant maker have in common? Do both organizations have common interests in the community? Education? Supporting members? Feeding and clothing the poor? Revitalizing neighborhoods? Find the commonalities and exploit them.
- How will your winning an award benefit the grant maker?
 - Will an award to your organization help facilitate the grant maker's end goals?
 - Can the grant maker point to your program or project and show others how the job is supposed to be done?
 - Will it make the grant maker look good to both the public and to other grant makers? They may not admit it, but it is important to them.

The Best Presentations Have...

- **Color:** In both presentation materials and PowerPoint slides, color sells.
- **Professional presentation materials:** Spend the money to look good.
- **PowerPoint:** No more than 10 minutes; some word or image action is acceptable if it is not excessive.
- **Presenter's script:** Talking points should not mimic the wording on the screen; slides should be a supplement to the presentation script.
- **Presentation packets:** These must be clear and easily understood after your departure.

A Note about Grant Makers

Grant makers are not democracies. The vast majority are run by intelligent, caring people who want to make a difference with the funds they administer. They are not usually legally bound to follow the directives set out at the establishment of the foundation or trust, but most work to abide by those guidelines. They can and do decide awards as they see appropriate and therefore may be perceived as unfair. Basically, they can do as they please.

Get Your House in Order

Many nonprofits are very good at addressing the needs and providing the services they were developed for. Many, especially smaller nonprofits, do not realize they are a *business*. Before and during the proposal process, your organization should get things in order to enhance approval prospects and show you understand this concept.

- **Bookkeeping:** Get all bookkeeping up to date. Hire a professional if necessary. Develop accounting trails back five years if possible.
- **Budgets:** Be able to provide past budgets (up to five years), the current budget, and future projections.
- **Tax returns:** Are they up to date? Be able to provide returns from the past five years if possible.
- **Nonmonetary record keeping:** Employment records, project development records, fundraising records, services provided, clients served, number of active volunteers, case histories, and similar information should be collected and organized. Volunteer hours have become a serious point of interest in recent years. If you haven't been using a volunteer tracking program, start now.
- **Organization history:** If one doesn't exist, develop a written narrative of the establishment and history of the organization. This will prove to be an excellent reference tool for use in the grant-seeking process and for those involved in the project who will be communicating to others about it.
- **Project definition:** Is the project clearly defined with the processes and goals understandable to all involved? Is it equally understandable to those outside your organization? Don't use "code words" or inside acronyms.
- **Donor history:** Collect donation records from individuals, businesses, and organizations. Names and amounts in an easy-to-access database work best.
- **Previous grant awards:** Document amount, source, date(s), projects funded, and any extra relevant information pertaining to the award(s).
- **Project readiness:** Is a brick-and-mortar project "shovel ready"? Is a social service project planned, organized, and ready to execute? Is a general operating funds request ready for receipt of award and implementation? If not, get it ready.
- **Expertise within your organization:** Talk to staff and in-house volunteers to see what knowledge, resources, and contacts they may have access to regarding how they can provide expertise to the project. You will probably be surprised.
- **Outside expertise available to your organization:** Talk with those friendly to your organization who may not be affiliated in an official capacity about the project and how they might lend expertise and support to the project.

Prepare to Be Accountable

- **Funds disbursement plan:** Determine who will be responsible for handling the award funds. Determine how the funds will be accounted for. A separate checking account may be advisable for the project.
- **Transparency:** Set up the accountability hierarchy and funds management in a manner that will make the process inherently transparent and understandable to outsiders.
- **Audit preparedness:** Assume an awarding grant maker will audit the project. If you have made the information transparent as described previously, there should be few, if any, problems.

The Proposal

The Most Important Rule

Always follow the application instructions to the letter. For example:

- Larger grant makers use scanning software that is set to best pick up certain fonts and type sizes, so use the font and type size specified, if any.
- The grant maker may use automation that does not tolerate extraneous items, so don't use staples and file folders if this is specified.
- If a page length is specified, never go over, and follow all other instructions regarding formatting. Make your best argument in the space allotted. Write and rewrite as necessary before submission.

The Second-Most Important Rule

Any extra detail you can add to your request, along with your highly detailed preparations, will put you ahead of the pack with a potential grant maker. Make it simple and easy to understand while giving the best picture possible.