

NOVEMBER 1996 DIALOGUE

Number 6

A Periodic Newsletter for Development Officers

— Bill Somerville, Editor —

In this issue of *Dialogue* is a copy of "The First Step In proposal Development" by Martin C. Lehfeltd of The Lehfeltd Company in Atlanta, Georgia. Mr. Lehfeltd is a senior consultant in proposal writing and fund raising and has extensive experience working with community foundations, black colleges, and social service agencies. He has developed this form to help people get organized in their search for support.

The Editor is impressed that this form helps people be pithy and to the point. Lehfeltd points out that this document can become the nucleus of all proposals developed by an agency.

THE FIRST STEP IN PROPOSAL DEVELOPMENT
(A 500-word description of an organization or program and its plans)

The purpose of the _____, now ____ years old,
(name of your organization or program)

is to _____

It is the only [What sets it apart from similar-organizations is] _____

Since 19____, it has _____
(describe major services, quantifying whenever possible)

Perhaps its most significant accomplishment was/has been _____

The operating budget is now \$_____, only ____% of which underwrites administrative costs, including salaries for a staff of _____. The rest of the budget supports _____, _____, _____, _____, and _____. The organization has operated in the black for ____ years [Although the organization has an operating deficit of \$_____, _____
(give some indication that you have a plan to correct the situation)

_____.]

The organization's major source of operating support is _____
_____. Its remaining revenues derive from _____

(government grants; contracts/fees/subscriptions; individual contributions; foundations, etc.)

The ___-member board includes such leaders as _____

The long-range goals of the organization include _____

(describe growth or development as measured by opportunities for service)

The board has determined that the highest priority of the organization is to _____

(be as specific as possible)

by 19 ____. Achieving that goal will enable the organization to _____

The cost of this activity/project will be \$_____, toward which board
members themselves have committed \$_____. Other supporters include _____

The organization believes that it can achieve its goal because _____

(cite other strengths)

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Questions From Our Readers

- Q:** How would you suggest advocating for a foundation to extend its geographic giving boundaries?
- A:** Carefully. Foundations that are growing in size are often prone to consider increasing their geographic boundaries and one should inquire from time to time to see if there are changes. If you are outside the boundaries of a foundation but would like funding, point out how your project could be beneficial to the foundation in its efforts to address a particular social issue i.e. you would share reports and results with the foundation for its use and be available as a resource to foundation applicants who have questions on the same social issue. In other words, show the funder what's in it for them.
- Q:** What is the etiquette of new organizations introducing themselves to foundations? What is the best way to do this with their busy schedules?
- A:** Send a letter of introduction with an invitation to visit your site. Make it short, to the point, and warm. Follow up with a telephone call. Put the foundation staff person on the mailing list for your newsletter. Call special things to the attention of the foundation staff person e.g. funding you received, media coverage, etc. The secret is follow up without being bothersome.
- Q:** What is a good way to display in-kind contributions in a proposal budget?
- A:** The Editor prefers that in-kind contributions be shown separately from normal budget items. Often in-kind is equal to "local support" and is very important in showing the strength of an agency. In-kind illustrates the ability of the agency to be imaginative in seeking support and the reputation of the agency in getting such support.
- Q:** Is it appropriate to identify and recruit foundation representatives (staff or trustees) to serve on Campaign Advisory Committees?
- A:** It's OK to invite but one doubts how many will accept. Another approach is to invite a foundation representative to be an advisor rather than sit on a committee. In other words, you could call the person, get ideas, and have all the input you want but not lose such a person because they felt they couldn't sit on a committee. If you wanted such a person because of their name identity and that of their foundation, that is why most will refuse the invitation. The Editor sits on some advisory committees of grantee agencies but more often offers advice as an individual.
- Q:** Is it appropriate to include foundation prospects in feasibility studies?
- A:** A better idea is to keep foundation personnel (with whom you have had previous contact) informed about your planning and to make the study available when you ask for funds.
- Q:** Why are some foundations not interested in capital campaigns?
- A:** They gobble up too much money, especially if the foundation is smaller in size. They also represent a disproportionate sized grant to an agency with regard to the normal granting program. Why not try, when the campaign is almost over, to ask the foundation for the final amount - this might get the foundation to become involved.

Q: Why is it that many foundations are not interested in my rural county?

A: You're not well known nor heavily populated. You have to be imaginative in your approach vs. please feel sorry for us in ___ county. Keep trying with foundations because you are actually educating the foundation personnel about your county and they could come to a new appreciation of what is going on.

Comments on Dialogue

"I admire and applaud your attempts to establish valuable communication links between grant seekers and grant makers."

Willard G. Wyman, III
Fund Development
Napa County Land Trust
Napa, CA

New Service

The Editor is willing to review brief proposals (up to 10 pages) and give critiques to the authors over the telephone. There is no charge but a question for Dialogue must accompany the proposal for review.

Fax your questions for Dialogue to (510) 645-1892:

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