Ask the funder

Thurlow/Associates recently sat down with a local private foundation to discuss the foundation's process, preferences and peeves. While they have asked us not to include their name, we believe their input is broadly relevant. Some clear takeaways include the following:

- Do your homework to be sure your request matches a foundation's interests. Don't overlook the opportunity to learn more from the foundation's own website — and/or from the appropriate foundation representative.
- Write clearly and be specific about what you do and what you need.
- Follow any and all guidelines precisely.

Read on for further details.

What are some elements that set a solicitation apart from the rest?
We value a clear and focused narrative that is easily understandable and tangible. The narrative should be personalized to reflect that you understand our mission and how your program fits the goals of the foundation.

What are some common "mistakes" that nonprofits make while trying to solicit funding?
Common "mistakes" include:

- Not doing your homework regarding the foundation's focus and goals.
- Not calling ahead or looking at our website to ensure a fit.
- Not personalizing your solicitation to demonstrate a clear understanding of our mission.
- Not clearly telling the story. We shouldn't have to dig deeper to determine what you are doing/asking for.

Any pet peeves when it comes to solicitations/proposals/packaging?
The foundation distributes guidelines regarding the application process (once invited to submit a full proposal). These guidelines are very clear and it is obvious when people don't read them. For example, we ask that people don't staple applications, though we get many stapled packets. This guideline is important because once a full application is received, we process it, as follows:

1) First, we take out all additional information submitted. We only use the sections/pieces we requested.
2) We then "blue back" the applications [assemble each in a standard format] for the board in an effort to make a level playing field. We only include the information essential to helping the board make a decision.

Soon the foundation will be switching to an online grants platform, which will streamline the way we process the information and hopefully eliminate the need for staff to "mine" what is submitted for the essential information.

How does a board member review a solicitation differently than a staff member?
The foundation's board is very involved and aware of the regional nonprofit community. They tend to be more passion-driven and grant funds based on whether or not they would personally invest in the organization. For the board, it's about connection and relationships.

The staff, on the other hand, is much more process-driven. We review submissions through a set of formal procedures and present the most pertinent information for board review.

Do you find stories/anecdotal information helpful in a request for funding?
Both data and stories are important. The stories connect the foundation to the work and bring the work to life — and the data should support your story. While being mindful of space, we encourage stories to support what you are asking for. At the end of the day, a good storyteller is going to get the point across.