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Grassroots Fundraising Journal

A PUBLICATION OF
GIFT
Grassroots Institute for Fundraising Training

Starting the Year Off Right

Activating the Social Media Grassroots

Building Relationships with Grantmakers

Insights of a Methodical Communicator

Visit us online at grassrootsfundraising.org

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FEATURE

Fresh Perspectives for 2015…

AS MUCH AS I DISLIKE the over-commercialization and consumerism of the holidays, this past holiday season reaffirmed for me how good it feels to give. As the holidays approached, I found myself filled with warmth and anticipation as I imagined my kids' reactions to opening their gifts.

Extensive research documents the benefits of giving to the giver, including increased happiness, lower blood pressure, greater self-esteem, decreased depression, and lower stress levels. A 2006 study by researchers at the National Institute of Health found that when people donated to nonprofits, the reward center of the brain was stimulated, releasing endorphins and triggering what has been referred to as "helper's high."

I find it helpful to re-read these studies whenever I get a case of the fundraising blues. Instead of (at my worst) feeling like we're begging for support, I'm reminded that fundraising is really about providing stakeholders and allies an opportunity to deepen both their engagement with our work and their commitment to our shared vision for change (while reaping some personal benefits as well).

In the coming months, we will be offering you opportunities to engage on a deeper level with GIFT and the *Journal*. As we approach the 35th anniversary (yes, you read that right) of the *Journal*, we are looking to you, our loyal readership, to take part in shaping the future of this publication. Keep an eye out for a reader survey soon, which will help us learn a little more about you, the type of work you do, and how we can ensure this resource is as useful as possible.

We will also be asking for your ideas and assistance with making the *Journal* more financially sustainable through a variety of fundraising and promotional activities. We have never doubted the helpfulness of the *Journal*; our challenge has been making sure it reaches everyone who could use it.

This issue of the *Journal* includes articles aimed at helping you start off 2015 on solid fundraising footing. First, Cayden Mak of 18 Million Rising: Activating Asian America explains how 18MR builds resources and awareness using social media, sharing powerful examples from two different campaigns. Next, we take a break from our usual exclusive focus on grassroots fundraising to bring you a piece by grants consultant Sheryl Kaplan. Sheryl developed a comprehensive piece on building relationships with funders, from prospecting and networking to making the initial call. Yee Won Chong completes the issue with a handy guide to creating and sticking with a communications plan.

With gratitude and to your fundraising success,

Jennifer

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PHOTO BY DEEP SINGH

The Jakara Movement + 18MR caravan outside the Columban Mission Center in El Paso, TX, with Father Bob Mosher.

Activating the Social Media Grassroots

Lessons in Cultivating Online Communities

By Cayden Mak

ON NOVEMBER 8, 2013, TYPHOON HAIYAN made landfall in the Philippines. It was the strongest typhoon in the history of the Philippines—its unparalleled power brought unprecedented destruction. As Filipino Americans struggled to find out if their family and friends in the Philippines were safe, they also began engaging in conversations online about why Haiyan was a disaster on the scale that it was. Not only did Filipino Americans raise questions about how aid would be funneled to survivors, they also joined an increasing chorus of Asian American voices identifying climate change as a major threat to the world as we know it. Instead of the mainstream narrative of a freak superstorm, these Filipino Americans were connecting U.S. carbon emissions and U.S. imperialism to the rise of superstorms like Haiyan.

Part of this conversation centered around Naderev Saño's leadership on climate at the 2012 United Nations Climate Change Conference. But much of it, including key parts of Saño's moving personal story, could only be accessed through the social media grassroots: videos on YouTube shared on Facebook and Twitter, essays written by Filipino Americans in online publications, and fundraising for grassroots organizations doing relief work on the ground. This work taking place on social media transformed the moment from simple disaster response to an opportunity to advance a political and economic analysis that informed everything from relief work to the climate movement.

While these conversations have always happened in local communities, what happened online after Haiyan demonstrates that more and more of our personal and civic lives extend into online spaces. This extension gives us access to ideas and voices we might not have otherwise. Indeed, being online is changing the way we think of our communities. With increasing numbers of people online, it is highly likely that stakeholders in almost every kind of organizing work are spending a meaningful portion of their leisure time reading, thinking and discussing online.

Cultivating Community

Organizing through social media means cultivating community in this new space. Seizing the opportunities presented by social media, especially for organizers, isn't just a matter of using the hot new tools of the moment to amplify news about our work: it's an important component of understanding a dynamic and challenging mediascape that shifts quickly and brings stories from the grassroots to the forefront of national—and international—discourse.

While social media create incredible opportunities for grassroots organizers and small organizations to share their stories and build support for their causes, using social media for strategic campaigning is a bit more challenging than simply spending time on Facebook. In order to successfully deploy social media campaigns, organizers need to understand the tools' strengths and limitations. For the past two years, as the new media director at 18MillionRising.org, I have been able to experiment with and develop best practices for cultivating community on a variety of social media platforms, and, in turn, translate that community into action for racial justice.

18MillionRising.org (18MR) was founded in 2012 to organize Asian American and Pacific Islander (AAPI) communities online. Our work ranges from civic engagement work like activating the AAPI vote to mobilizing AAPIs in solidarity with other people of color in the fight for racial justice. Since our organizing is almost exclusively on the internet, a crucial part of our work is a comprehensive social media strategy to find members of our community, spark critical conversations, and activate those community members as leaders of and participants in campaigns.

18MR is uniquely positioned to try new techniques in new media organizing. Since AAPIs have the highest consumer technology penetration of any racial group, organizing on social media, for us, is part of what we do to meet our people where they're at. Even in spite of socioeconomic divisions within AAPI communities, the overwhelming number of young AAPIs who use social media daily on computers and smartphones has led us to develop sustained strategic use of key social networks.

We maintain accounts on Facebook and Twitter, which most organizations are already using. We also use Tumblr, which is now one of the top 50 most popular sites in the U.S. For us, Tumblr was a strategic choice due to reports from Quantcast—a web service that tracks traffic and demographics across most major websites—that its user base skews young on the age axis and Asian American and Latino on the race axis. Quantcast data on Tumblr is no longer public, but an examination of popular social networking sites using the service can shed light on where organizations can reach potential new members.

An Experiment in Online Disaster Relief Fundraising

In the aftermath of Typhoon Haiyan, the 18MR community came together around disaster relief and fighting climate change. Like most of our campaign work, our response to Typhoon Haiyan took many forms. In the weeks after the storm, we:

- Rolled out a relief fundraiser to benefit the National Alliance for Filipino Concerns (NAFCON), a direct services organization on the ground, vetted by members of our trusted volunteer network who have worked in the Philippines;
- Ran a campaign to honor Naderev Saño for his leadership at the UN Climate Change Conference;
- Amplified the efforts of other organizations using technology to help survivors reach out to loved ones abroad;
- Published our perspectives on the crisis through mainstream media outlets, such as 18MR Director Christina Samala's essay about climate reparations, published by Al-Jazeera; and
- Delivered our members' comments to the Philippines Consulate in San Francisco in early December 2013.

Raising money for disaster relief was a new experiment for 18MR. Previously, we had directed our members to other organizations doing online fundraising for other causes that required rapid response donation. But we noticed a severe lack of options to donate to grassroots Filipino organizations, and the organization that we eventually chose, NAFCON, only had a small social media presence and a basic donation button on their website. So, we decided to help fill that gap. We knew that our members were already looking for places to put their dollars that would use the money in a way that responded to the real needs of Filipinos and reflected our commitment to community autonomy.

Over the course of the fundraiser, we raised $4,800, which included $225 in recurring donations from members. The majority occurred within the first two weeks, when members had typhoon relief at the top of mind. As the typhoon began to phase out of the media cycle, donations to the relief fund also waned. Importantly, while the link was emailed out to our list, over half the donations came from our social media membership.

Perhaps the most striking result of this fundraising ask was seeing the way our community shared it with their networks. With plenty of speculation spreading about the use of relief funds in the field, interference by regional and national government bodies in the Philippines, and knowledge of the enormous overhead facing multinational NGOs like the Red Cross, members shared our fundraiser with comments to their friend networks endorsing 18MR as a source of trustworthy information, good research, and worthy politics. Though we were unable to see every social media share, many of these comments were available to us from Facebook posts that tagged our page, direct shares off our page, tweets that included us, and reblogs of our Tumblr posts.

This fundraising campaign illuminates a key part of our success on social media: our ability to build a voice and nurture relationships with our audience. Over the past two years, we have spent a great deal of time and energy cultivating a clear identity online, making our social media outlets trusted sources of political and cultural analysis for young, left-leaning AAPIs. In order to do this, we've committed to giving our members a wide variety of ways to engage with our campaigns and content.

Tree of Engagement

At 18MR, we tend to think of the internet as way to offer our members a dynamic tree of engagement, as opposed to a ladder. Becoming a part of our network isn't a linear progression—members may enter in the upper branches, or at the trunk, and move to different parts of the tree, skipping some branches or branch segments altogether. This means we are constantly personally engaged with our membership, whether we're replying to Facebook comments, taking campaign suggestions, or working with our committed crew of volunteers to identify and offer analysis on newsworthy tidbits from around the web. Our volunteer team of curators is constantly talking about issues and ideas that are important to them and their networks, helping to ensure a broad scope and a depth of focus that might escape a smaller team of curators.

In campaign terms, this also means offering a variety of ways to participate. In the response we led after Typhoon Haiyan, we offered a number of different levels and kinds of engagement including the intensely personal—sharing personal stories and words of encouragement to the Philippines Climate Change Conference delegation; the political—sharing ideas about climate reparations and the responsibility of the U.S. to countries like the Philippines; and the purely material, through our relief fundraiser. This multi-pronged strategy encourages members to participate where they feel comfortable, but also demonstrates of our organization's commitments to the causes we take up. More than just running campaigns, we are building a culture of participation.

This culture of participation is a crucial part of our success. Members feel comfortable sharing campaign ideas, personal stories, and their own projects with 18MR. To the social media team, this is strong evidence that our members aren't just looking to us for leadership to shape narratives—they see us as a resource to amplify their voices. Building trust with our constituent communities online is a crucial part of our overarching strategy. A culture of participation means that individuals are empowered to engage in issues that matter to them in ways they feel have impact.

Grassroots Social Media Fundraising in Action

Sometimes, fostering a culture of participation also means creating opportunities to engage where none exist—and where members may not have previously thought to engage. In late March of 2014, the story of 37 Punjabi asylum seekers detained at the Immigration and Customs Enforcement processing facility in El Paso, TX, re-emerged in the news cycle, after Colorlines' Aura Bogado had initially reported it in December of 2013. By April, Jakara Movement, a grassroots Sikh youth organization with a strong presence in California, had begun organizing in support of the El Paso 37.

Jakara Movement organizers and 18MR staff began talking about how 18MR could support a road trip down to El Paso to attempt to visit the detainees. In addition to doing outreach to field organizers and other activists in El Paso, I agreed to ride along to help run social media and broadcast to our audience and the public what we were doing, where we were, and what we learned. I drove from Oakland to Fresno to meet up with Jakara Movement organizers, and we caravaned from Fresno to Los Angeles, stopping at Sikh gurdwaras and community centers along the way.

On one of our stops, I received a phone call from the Department of Homeland Security, who gave permission to one of the Jakara organizers, Deep Singh, to meet with the detainees. Father Bob Mosher at the Columban Mission Center in El Paso gave us a place to rest and wash up after our long journey, which was much needed, since we drove from Los Angeles to El Paso overnight. In the morning, Deep visited the detainees, and we held a press conference calling on ICE to allow the detainees to pursue their asylum cases in court. Then, we drove back to Fresno.

As 18MR shared this story with our members, we also wanted to find a way for members to engage in the journey. In addition to the petition to ICE calling for the release the detainees and the ability to pursue their asylum cases, we created a fundraiser to help offset the costs of van rental, gas, food and other incidental needs for the trip. We made it explicit that the money raised would be a direct reimbursement to 18MR and Jakara Movement for the caravan expenses specifically.

At each stop, I mentioned the fundraiser on social media when we shared news of our activities. Contributors from around the country helped us raise $625, the cost of the van rental plus a little extra. Some contributors gave large sums—as much as $250—demonstrating their deep investment in the caravan and the campaign. This was the first time we had raised money directly for a program-related expense, and given the compelling narrative and immediate need for funds, our members responded.

Notably, nearly all the money was raised off social media asks. We included the fundraising link in an update email after I returned to the Bay Area, which only generated one contribution. Instead, it was our social media membership, invested in the story and following the campaign, that came through to fund our journey. Unlike the Typhoon Haiyan fundraiser, we built a story about the El Paso 37 that lived predominantly on social media, and captured the attention of news outlets via our social media presence. Our email list, which had previously only seen an ask to sign a petition to ICE, was clearly less invested in the caravan than those who had been following the minutiae of the journey on Twitter.

Both the Haiyan and El Paso 37 fundraising examples illustrate the importance of building a thoughtful, sustained social media campaign to fundraising online. Especially when fundraising for a particular program, making strategic asks of a base that is already engaged in a campaign and invested in a cause can yield compelling results on social media. However, in order to do so, organizers and groups need to be invested in cultivating relationships with their base and think strategically about building narratives about their projects and programs in order to make those fundraising asks effective.

In both cases, social media offered the opportunity for a geographically distributed network of individuals to be in community with each other around a common cause. 18MR filled a gap in the social media landscape for typhoon response and by shedding light on the plight of the Punjabi asylum seekers in El Paso. Without the trust we had built with our members on social media, however, neither of these campaigns would have been possible.

Effective use of social media takes an investment of effort over time, an understanding of your online stakeholders, and a commitment to a shared culture of action. 18MR is looking forward to expanding our offerings for action online in the coming year, diversifying the ways members can engage. We believe that by offering compelling analysis and building multiple pathways to action, members can find a way that the work speaks to them and a reason to invest in Asian American and Pacific Islander organizing online. ■

Cayden Mak is the new media director at 18millionrising.org.

Want MORE tips for raising funds online? Check out these and other articles in the *Journal* archive:

- *The Bowl-a-Thon Gets an Online Make Over* by Yasmeen Perez
- *Raising Funds & People Power Online* by Brian Dever & Erin Barnes
- *"Soy Safista": Turning Community Ownership into Community Dollars* by Heather Yandow & Meredith Emmett

Building Relationships With Grantmakers

By Sheryl Kaplan

You can't get milk from a cow by writing her a letter. You've got to pull up a milk stool and have a conversation.

~Sy Seymour

If you're doing the relationship thing right, it's possible to get a grant with a terrible proposal. If you're not doing it right, a proposal written by Shakespeare or Hemingway wouldn't get you funded.

~Jane Sevitt Tennen

Why Relationships Matter

As with so many other aspects of life, building good relationships (in this case, with grantmakers) has many benefits in fundraising. For example, you might be able to obtain inside information not available in a foundation's published guidelines. A foundation staff member may also advocate for your proposal as it wends its way through the channels, and she may even offer to review it before you officially send it in—which is known as getting really lucky. In addition, relationship-building efforts can result in the next big opportunity without realizing it at the time.

Some foundations that preclude unsolicited proposals and Letters of Inquiry (LOIs), which are discussed further below, will make grants to new nonprofits on the recommendation of trustees or staff. You can only get to them by building relationships, and you build relationships by being visible and by connecting and interacting.

Pick up the phone and call (when appropriate) instead of relying solely on email. Foundation fundraising (like all fundraising) is about relationships. A real person will read your proposal, and foundation staff are often receptive to phone calls if they can help you submit a better proposal. It makes their job easier too!

~Caroline Herbert & Sarah Jo Neubauer
Foundation Center blog *Philanthropy Front and Center*

First Step: Do Your Homework!

Grants are not free gifts given to good people who want to do good things.

~Maryn Boess

Contacting a grantmaker with a phone call or written proposal without doing research first often wastes time and effort, for both you and the funder. Not doing your homework can also make you seem unprofessional, which could affect your nonprofit's reputation. Foundations keep a record of these communications and will remember them in the future. Furthermore, they talk with each other, so there can be long-term ripple effects of not adequately researching funders before contacting them.

A Sampling of Prospect Research Databases

Free:

Foundations.org: foundations.org/grantmakers.html (Northern California)

Southern California Grantmakers: socalgrantmakers.org/directory

University of Wisconsin Grants Information Collection: grants.library.wisc.edu/organizations/animals.html (Animal Rescue and Rehabilitation)

Rural Assistance Center: raconline.org/funding/topic

Michigan State University Libraries: staff.lib.msu.edu/harris23/grants/2sgalpha.htm (categorized by subject)

Council on Foundations: cof.org/members-directory/non-members

Fee-based:

GrantStation.com (also newsletter with announcements)

The Grantsmanship Center: tgci.com/grantdomain

Foundation Search: foundationsearch.com (sophisticated tool)

Foundation Directory Online: fconline.foundationcenter.org (very popular)

The Chronicle of Philanthropy: philanthropy.com/factfile/grants (free for The Chronicle of Philanthropy subscribers)

Hoovers: hoovers.com (corporate)

You can sign up for grant opportunity email announcements from organizations such as the Foundation Center and numerous grants consultants. Examples (free except the last two) include:

Philanthropy News Digest: philanthropynewsdigest.org/rfps (sign up on right side)

Scan Grants: scangrants.com/ (mostly health/medical research and scholarships)

Mayor's Office of Partnerships and Grant Services: opgs.dc.gov/service/funding-alert-information (mostly for Washington, D.C., but not all)

Norris Consulting Group: norrisconsultinggroup.com/pages/news.htm (organized by deadline month)

GrantSpy: grantspy.com/sample.php (subscribing allows access to searchable database)

Society for Nonprofit Organizations: snpo.org/publications/fundingalert.php

The Chronicle of Philanthropy's upcoming application deadlines can be found for free at: bit.ly/LQMax8

CONTACTING A GRANTMAKER WITH A PHONE CALL OR WRITTEN PROPOSAL WITHOUT DOING RESEARCH FIRST OFTEN WASTES TIME AND EFFORT, FOR YOU AND THE FUNDER.

Clearly, not following their guidelines is the surest way to land your proposal in the recycling bin. Many grantmakers state that the most frequent reason for turning down requests is that they do not fit within their funding interests. The first step in finding grantmakers that may be interested in supporting your project or organization is to research funders that share your goals.

The Foundation Center (fdncenter.org), the primary source of reliable information on funders, is located in New York City, with branches in Atlanta, Cleveland, San Francisco and Washington, D.C. Its extensive research materials can be accessed for free at all their locations. In addition, its Funding Information Network—consisting of libraries, community foundations, and other nonprofit resource centers—has more than 470 locations worldwide. Network partners have the core collection of Foundation Center publications and a variety of supplementary materials and services. Nearly every public library has a copy of the Foundation Directory, which contains detailed information on almost all foundations. See the sidebar for additional prospect research databases and websites that will email you upcoming grant opportunities.

After this research draws up a list of preliminary prospects, the next step is to look deeper at each one. The foundations' 990 tax returns—available free from the Foundation Center and GuideStar—will provide you with a list of all grants made in a given year, among other useful information. Go back several years to see their giving patterns. If the foundation makes grants to the same organizations year after year, you might consider other prospects. However, if it varies its grantmaking from year to year, has an interest in your field, and makes grants in your geographic area and to groups similar to yours, it could be a solid prospect.

Also consult other resources to learn more about a foundation, such as:

- Its website;
- Foundation Center and GuideStar profiles;
- News sources, such as Philanthropy News Digest and local media;
- Internet searches;
- Materials published by the funder, including annual reports, marketing materials, and research papers; and

Affinity Groups & Resources

Asian Americans/Pacific Islanders in Philanthropy: aapip.org/who-we-are/institutional-members-and-partners

Disability Funders Network: disabilityfunders.org/grant_seekers (does not appear to be current but the listed opportunities repeat annually)

Environmental Grantmakers Association: ega.org/collaborate/grant-seekers

Funders' Committee for Civic Participation: funderscommittee.org/about_us/member_organizations/member_organizations

Funders Concerned About AIDS: fcaaids.org/AIDSFunding/2012GlobalHIVAIDSFunders/tabid/190/Default.aspx

Funders for LGBTQ Issues: lgbtfunders.org/seekers/community.cfm

Funders' Network for Smart Growth and Livable Communities: fundersnetwork.org/connect

Funders Network on Population, Reproductive Health, and Rights: fundersnet.org/index.php?option=com_content&view=article&id=51&Itemid=58

Funders Together to End Homelessness: funderstogether.org/members

Grantmakers for Southern Progress: nfg.org/gsp_south

Grantmakers Income Security Task Force: gistfunders.org/about/foundations.php

Grassroots Grantmakers: grassrootsgrantmakers.org/about-us/members

Hispanics in Philanthropy: hiponline.org/membership/member-directory

International Funders for Indigenous People: internationalfunders.org/ (membership list "coming soon")

International Gay and Lesbian Human Rights Commission: iglhrc.org/content/funding-opportunities

International Human Rights Funders Group: ihrfg.org/funder-directory

Media Impact Funders: mediaimpactfunders.org/network-members

Neighborhood Funders Group: nfg.org

Peace and Security Funders Group: peaceandsecurity.org

Philanthropy for Active Civic Engagement: pacefunders.org/members.html

Sustainable Agriculture and Food Systems Funders: safsf.org/who/members

Women's Funding Network: womensfundingnetwork.org/membership/member-directory

In addition to the affinity groups, a few other available resources for locating social justice funders include:

Funding Exchange: fex.org/memberfoundations

Philanthropy's Promise: ncrp.org/philanthropys-promise/about/foundations-that-have-signed-on

National Organizers Alliance: Progressive Foundations and Organizing Funding Support: noacentral.org/page.php?id=22&subid=29

Grant Seekers Guide: Foundations that Support Social and Economic Justice, edited by James McGrath Morris and Laura Adler (sixth edition, 2005).

- Local business journals

Your research should provide you with a list of foundations that make grants in areas related to your work, as well as what you need to know to apply to them, such as how they wish to be contacted, application method, deadlines, and supporting materials needed. It is more efficient, and in the end more beneficial, to send appropriate requests to fewer foundations than to send many in the hope that one may land in the right place. Thorough research helps make this happen.

An applicant that has done its homework and can demonstrate a close match between its mission and the mission of the foundation is more impressive than someone who has just thrown together a proposal. The more you know about your prospect, the better you can tailor your request to its values and interests—and the more likely foundation staff are to support your proposals.

Where Are the Progressive Funders?

Changing the world is not yet supported by the Pew Trust or National Endowment for the Arts.

~Noelle Hanrahan

At this point, you may be wondering: how do I find grantmakers that specifically support small progressive groups like mine? With the most recent data showing that only 12 percent of grant funds support social justice[1], it's a good question.

One way to find progressive funders is by checking the membership lists of affinity groups (see sidebar) of the Council on Foundations (the largest membership association of funders). These groups are not grantmaking organizations themselves, but the links are to their membership lists of foundations (except for the Disability Funders Network link, which is for grant opportunities). The lists will give you the names of foundations to research further to find out if they are potential funding prospects for your work.

1 blog.ncrp.org/2013/07/7-ways-to-maximize-your-social-justice.html

Finding the Relationships

Once you have identified and researched foundations that have a mutual mission with yours, the next step is to find the connections between the target grantmakers and your organization.

Review the bios and resumes of the funders' board members by conducting internet searches and looking at *Who's Who* (a biography reference source) and other directories. Check the Foundation Directory Online to identify other foundation boards on which trustees serve, and GuideStar for their memberships on other nonprofit boards.

GET INVOLVED IN YOUR LOCAL COMMUNITY BY PARTICIPATING IN LOCAL BOARDS, COALITIONS, CIVIC ASSOCIATIONS, AND OTHER NETWORKING GROUPS THAT CAN PROVIDE THE OPPORTUNITY TO INTERACT WITH POTENTIAL FOUNDATION DONORS.

Prepare a list of foundation board members and staff, along with their affiliations. Use your networks. Ask your board members, key donors, volunteers, staff, influential supporters, and the people you serve, if appropriate, if they know anyone on the list and are willing to make introductions.

If nobody knows anyone on the list, dig deeper to find out where the trustees spend their time. Get involved in your local community by participating in local boards, coalitions, civic associations, and other networking groups that can provide the opportunity to interact with potential foundation donors. You can also try attending meetings of the Chamber of Commerce and other business events. You might be surprised at the connections you could make there among movers and shakers in your area looking for opportunities to network. One woman reported to me after attending one of these meetings: "Everyone I met had something helpful to say. A financial planner is on the board for the county libraries, and she's going to get a name of someone for me to contact who could get us connected with them for referrals. A guy told me that a local author is passionate about raising money for places that help kids learn to read. Another guy does promotional materials."

If possible, go to nonprofit and grantmaker conferences. Although it is not appropriate to solicit there, you may be able to present at a workshop or on a panel and talk to program officers. Also, if you travel out of town for these or other activities, see if you can set up meetings with potential funders in those areas.

Relationship mapping software is another way to identify and track potential donors and connections. Two leading subscription services are Prospect Visual (prospectvisual.com) and Relationship Science (go.relsci.com/nonprofit). Prospect Visual allows you to use the relationships of existing donors to gain introductions, connect the dots within your portfolio to find new prospects, and engage more prospects by approaching them through their peers. The RelSci Platform gives users the ability to run paths between any entity (person, place, list) to any other entity and get a sense of how they might be connected.

Do-it-yourself (DIY) software Muckety (muckety.com) uses a database that focuses on national powerbrokers. NodeXL (nodexl.codeplex.com) is a free, open-source template for Microsoft Excel 2007, 2010 and 2013. Other companies are also upgrading their existing software to enable the storing and tracking of relationships.

Of course, just because two people went to Harvard Business School at the same time does not mean that they know or love each other, but the connection is a starting point.

How to Start Building Those Relationships

You never get a second chance to make a good first impression.

~Will Rogers

Once you have identified relationships, see if the people with the connections to the prospects will ask the foundations—either in person or by writing a brief, personal note—if they would be willing to look at a proposal from your organization. Be judicious when asking well-connected board members and supporters to make introductions—only ask for an introduction after you have done the research to determine that you have a good chance of having your proposal considered. Asking board members too often or for frivolous reasons could alienate them.

When you meet foundation program officers in the community, follow up with materials and information that might interest them—not the hard sell for your organization, but the soft sell of information that builds on your mutual issues. Include a brief note saying that it was nice to meet them and you appreciate their work in the community. Get their business cards and start to develop the relationships a little further. You really don't want to bonk them over the head with a grant inquiry right away. Try to meet them at least once or twice more first at community events.

Add the foundation to your mailing list if your organization publishes a newsletter or other materials such as press releases. Again, include a brief, hand-written note that reiterates your shared interests. Also consider connecting with them on LinkedIn and Twitter. While site visits are usually initiated by funders, it is appropriate to extend an invitation, particularly if they are local and if you can give them a first-hand view of the program in action, rather than of people sitting in cubicles staring at computer screens.

Nurture the new relationships, and let them grow over time.

The Next Step: Making the Approach

If a foundation has not stated a preference for an initial approach or mode of contact, it generally is safe to call. Use your research and be ready with your talking points or otherwise show that you have spent some time learning about them. This will make a good impression. Your research will enable you to ask more in-depth and detailed questions, beyond what is readily available online, which means a better use of time for both you and the funder. There is an example on the following page of how to approach funders by phone, written by my colleague Sarah Sutton, formerly of the Carlisle Historical Society.

Those Dreaded Three Words: Application Not Accepted

What do you do if your research indicates that the foundation only makes grants to preselected organizations? Most of the larger, staffed foundations accept applications, but many smaller, unstaffed foundations do not. A 2009 Foundation Source survey of its clients—all family foundations—found that 77 percent would not consider unsolicited requests. I looked at independent foundations (which would include family foundations but not corporate foundations, for example) in the Foundation Directory Online and found that 70 percent say they do not accept applications. Common reasons include: the foundation has an internal process for identifying and selecting its grantees each year; it has been legally set up for the benefit of specific organizations; or it does not have the capacity to receive and review a lot of proposals.

But you may still want to approach some of these foundations, especially if their giving interests closely match your organization's needs. Doing this can be tricky, since foundations establish their policies for a reason. Organizations that wish to partner with them to support their programs need to respect those policies.

Making the Call

By Sarah Sutton

A critical piece of proposal writing isn't writing at all, it's talking. If you haven't called to speak to a foundation officer or program director before preparing a proposal, you risk wasting your time writing it and someone's time reading it.

Most of our initial donor information comes from print and electronic publications that could be out of date, or worse, gathered without the donor's input. It could be grievously, or just slightly, wrong. You could be applying for the right program with the wrong audience, or the right project and the wrong amount of money. A discussion with their staff will help you craft a more responsive and complete proposal, and improve your chance of success. This call is not for reconnaissance; that's done during preliminary research. Collect all the information you can; then call the foundation only if you see no reason not to apply, or you if have a question about a specific requirement that you cannot answer through your own research.

Before picking up the phone, come up with your elevator pitch. This survivor of the early days of venture capital is your 30-second sales pitch. Develop and practice it before making the call—write it out in case your courage fails you or your mind goes blank.

Tell whomever answers: "I'm Sarah Sutton from the Carlisle Historical Society. I've read your guidelines and form 990, and visited your website. I believe our project matches your interests, but I would like to be sure before I submit a proposal. May I speak with a program officer about the appropriateness of the project and its components?"

Then they know you have done your homework and will let you past the front line. When you reach the officer explain:

"I'm Sarah Sutton from the Carlisle Historical Society. We are considering applying to Tacoma Foundation for support of a community restoration project for our historic graveyard. We work with professional stone conservators to train high school students, adult volunteers and the Town's department of public works in identification, assessment and care of these 18th century burial markers. 75 percent of the stones have suffered from weather and vandalism, and lie broken or buried in the graveyard. Our five month training and conservation project will record and restore 81 stones, provide volunteers and town staff with training for ongoing maintenance, cultivate adult supporters of historic preservation, and encourage students to value and protect this site."

If you are pretty sure how much you will ask for, say "The project costs $xxxxx and we would like to ask the Tacoma Foundation to consider $xxxxx in support of this project." If you are not quite sure the project is appropriate, say "Do you have time to speak with me about the appropriateness of this project?"

You will have answered the who, what, when, where, how and why. Now it's their turn to ask specific questions and then recommend whether or not you should apply, and how to apply. Of course this means you have to understand the project entirely before making the call, and have a backup project if you miss the mark. Be ready to answer questions like:

- *Which of your personnel would be involved?*
- *How much it will cost?*
- *What are the goals and the outcomes?*
- *Can you replicate it?*
- *Would it be better done with a partner?*
- *Has anyone else done this? Why or why not?*
- *Why are you the best to do this?*
- *If it involves construction, do you have all the permits needed, start and end dates, and estimated cost? Do you have any contingency funds, and will you have to borrow?*
- *Who else are you asking to fund this?*

It's okay to ask how competitive the project might be. They will explain that every pool is different, but that generally this type of project scores well (or does not). They have no time to waste reading ill-fitting proposals so they will give you a fair answer. If the answer is, "You are certainly welcome to apply, but…", don't. If they encourage you to apply, do confirm the dates and the contact name.

Foundation officers and government program directors are in the business of finding good ways to share their wealth. They want the best matches possible. Your intelligent, efficient presentation is an excellent introduction for your organization. Even if this project doesn't work out, your professionalism will be appreciated and will help you next time you call.

Remember to thank them for their time. They work hard too, you know.

If your organization does not already have connections with the foundations you wish to approach, the techniques already discussed for establishing and cultivating relationships can still be used. You might have more success with foundations that state they "do not encourage," rather than "do not accept," unsolicited inquiries.

What follows is an example of one way to get a foot in the door. I contacted a funder that I knew did not accept applications because I felt there was a strong match with the proposed project and because its name kept popping up as I did the prospect research. I wrote:

ABC appreciates the consideration given to its past request for support from The XYZ Foundation. At this time, we would like to once again seek your support. We understand that you are not currently accepting applications and wonder if you have a timeline for opening up to new proposals.

The project that we hope to submit to the Foundation is for a study to see if people with diabetes can monitor their disease with a smartphone mobile application.

Is this project something that might be of interest to The XYZ Foundation? If so, could you please let us know when might be a good time to send either a Letter of Inquiry or a full proposal? Thank you so much for your time.

I received this response:

Thanks, Sheryl. I will check and get back to you. What you are proposing is something I have been trying to get others [he is a trustee] enthused about.

While I am checking [with the other trustees], it would be helpful to know how much you will be looking for in this project.

I wrote back:

Thank you so much for your prompt response. I am delighted to hear that you share our enthusiasm about the need for the proposed study, which will be the first of its kind to monitor diabetics' insulin levels on their smartphones. In response to your question, the total cost of the project is $XXX,XXX. We are interested in requesting $XXX,XXX in support from The XYZ Foundation to enable us to begin the study.

Thank you again for getting back to me, and please let me know if you have any other questions. I look forward to your response.

He indicated that the amount we wanted to request was too much for them for a one-year grant, so I inquired about options such as reducing the ask by 50 percent or making it a two-year grant, which is what was ultimately awarded.

Fast-forward two years later to another project, where a new Letter of Inquiry to The XYZ Foundation raised some concerns (about our research methodology). In the interim, the foundation trustee I was in touch with, another trustee, and our agency's leadership happened to meet for lunch (unrelated to our project) when they were all in the same city at the same time—face-to-face being the most powerful type of contact, of course. Eventually, the trustee gave us the chance to address his concerns, ultimately leading to a second six-figure two-year grant, albeit half the amount of the first one. Without the strong relationship, facilitated by in-person meetings like the lunch, the inquiry most likely would have been declined outright.

IT MAY TAKE A WHILE TO BUILD THE RELATIONSHIPS, BUT THESE PARTNERSHIPS WILL PAY OFF IN MANY WAYS.

If you don't have connections, you can still send a letter that introduces your organization and explains how your project matches the foundation's giving interests. To avoid addressing your letter "To Whom It May Concern," try to get the name of the appropriate program staff person (you can call to ask). The letter should not include a funding request.

Betsy Baker, a grants consultant, suggests that this method of introduction makes it clear that you have read, understood and accept the foundation's guidelines. It should also ask how the foundation selects its grantees, how often it adds new grantees, and if you can meet with the program officer or provide more information about your organization. You can even ask for advice for approaching other foundations that would have an interest in supporting your organization. Once you have sent the letter, follow up in about a week and a half.

Following these tips will help get you on the right track to make your grantseeking efforts successful. It is important to keep in mind that it is a long-term process, just like other fundraising work. It may take awhile to build the relationships, but these partnerships will pay off in many ways. The process is not as intimidating as it may seem if you keep in mind that foundations consist of real people—just like you and your colleagues. They have something you want—money—but you also have something they want: the capacity to implement programs that will help them meet their mission. Although rejection can be disheartening, expanding your base of supporters to grantmakers is definitely worth it.

Now you are all ready to get started finding and building those relationships!

Sheryl A. Kaplan is a national grants consultant based in Los Angeles. She can be reached at Sheryl@skaplangrants.com or skaplangrants.com.

Insights of a Methodical Communicator

From Creating a Plan to Managing a Calendar

By Yee Won Chong

WHETHER WE CALL IT 2.0, the digital revolution, or the age of ubiquitous computing, the rise of information technology has resulted in nonprofits ramping up our communication efforts. There are many channels and platforms to consider, not to mention countless apps, add-ons and tools that help us to manage our communication tasks.

In this article, I share my three-phase process to develop my annual communication plan and manage a calendar that helps me cut the digital clutter. While these phases can be helpful when conceptualizing a communications plan, this process is not truly linear. As a communicator, I have to be aware of news headlines and trending topics to ensure that my communication is relevant. Planning and strategizing are not stagnant, terminable steps, but ongoing processes. I have to adjust at each phase to take advantage of new opportunities while still moving forward with my larger purpose.

STRATEGY PHASE

Success is often credited to good planning. When I was the development and communication director at Western States Center, I would gather my team in the last quarter of the fiscal year to plan for the following year. Depending on the size of your organization, this session may potentially involve all your staff.

I painted one of the walls in my office with whiteboard paint, one of the best "decorating" investments I have ever made. The wall gave us plenty of room for visual planning and brainstorming. With markers and Post-its in hand, we listed our top-level goals and their subsequent strategies on one end of the wall, and outlined our calendar at the other end.

Prioritizing Actions

We started by writing down "high stakes actions/events" in the calendar. High stakes actions are major activities, such as a fundraising event. If the communication plan fails for a high stakes action, the consequences are serious. Other examples include lobby days, high profile press releases, annual conferences and fundraising campaigns (see Project Management Basics sidebar on next page). Having high stakes actions on the calendar helped us identify months that are busier and months that were slower. For us, the slowest period was the last couple of weeks in August, right after our summer conference.

Next, we determined the timing of other routine actions—like certain website content updates, blog posts and monthly electronic newsletters. While these other actions are more routine, they are still important to the work. They are also movable on the calendar. Therefore, your high stakes actions help to determine the schedule and frequency of these movable, routine actions. For instance, it makes more sense to time your electronic newsletters to reach people when you want them to take an action, instead of sending your monthly e-newsletter on an arbitrary date of every month.

Naming the Audience

Our next step was to list the audience next to all the actions. Since your program team or development team may have already established the audiences for actions they are overseeing, you may be asking them to list them.

Having the audience listed on the whiteboard helped us to picture the communication "touch points" with our donors and constituencies. This visualization helped us arrange movable actions to ensure that our "touch points" were frequent.

Benchmarking and Evaluating Your Performance

My general philosophy is, don't do things that don't work. This seems obvious, but what defines "working" and "not working" is

PROJECT MANAGEMENT BASICS

While I have found the practice of professional project management to be more extensive than I need for my work, a few concepts and tools have been helpful, especially for managing high stakes actions. Before I go through some of these, let's define what a project is: a time-constrained activity undertaken to deliver a specified output within a specific timeframe using limited resources.[1] In the nonprofit world, projects are sometimes synonymous to campaigns. Projects are distinct from daily operations.

Here are a three project management tools that I've found useful in keeping every team member on the same page and on task.

Project Charter

I use a modified version of a typical Project Charter that outlines the goals, SMART[2] objectives, budget, benchmarks and responsibilities of each member of the project team (see RACI Matrix). This one-page document not only keeps all my team members on the same page, it also helps me to manage the overall direction of the project.

Gantt Chart

A Gantt chart is a document that lists the activities (rows) and the corresponding relevant dates (columns). It is used to track the start date, duration and the end date of an activity. I use a simpler version of a typical Gantt Chart to figure out the sequencing of activities. You can download an online Excel template, use an add-on app for Google Drive, or create one yourself.

RACI Matrix

A RACI Matrix is used to track the roles and responsibilities of project team members. RACI is an acronym and stands for:

- **Responsible:** Who is responsible for the execution of the task?
- **Accountable:** Who is accountable for the tasks, and who signs off on the work?
- **Consulted:** Who are the subject matter experts who need to be consulted?
- **Informed:** Who are the people who need to be updated of the project's progress?

1 Crow, Jeff. *Applying Project Management in the Workplace*, 5th Edition. Portland: Blackbird Publishing, 2006. Print

2 SMART stands for Specific, Measurable, Attainable, Relevant and Time-bound.

not always straightforward. This is where benchmarking comes into play. Benchmarking is the process of comparing a business's or organization's performance metrics to industry bests or best practices from other companies or organizations.

The *M+R Benchmarks Study*, published annually by M+R Strategies and NTEN, is the go-to reference for nonprofit online benchmarks. This study calculates the average rates of the approximately 50 nonprofits surveyed each year. Based on the study, you are in pretty good shape if your fundraising emails have an open rate of 12 percent and click-through rates of 0.45 percent.

Make it a practice to evaluate your performance after a project. Observe if certain content or the timing of your action increases or decreases open and click-through rates. Overtime, you will see a pattern and you will learn what to adjust to improve your numbers.

Another way to way to evaluate your performance is to interview or survey your audience. While surveys and interviews require more time, they are also effective relationship building tools.

DEVELOPMENT/DESIGN PHASE

Even though I am a visual thinker, the plan and calendar do not stay on the whiteboard wall for the rest of the year. Besides, it is too risky to have my erasable whiteboard as the only documentation.

Using Management Tools

I began this phase by transferring the notes from my whiteboard into a Word document. I fit the notes in a calendar chart that could be printed on one legal (8.5x14) or tabloid (11x17) size sheet of paper. This served as a macro tool to view the entire year. It was also a great reference for the following year's plan and powerful institutional history for future staff, now that I am no longer with the organization.

MAXIMIZE GOOGLE CALENDAR

Google Calendar is more than just a calendar tool. Here are a few of the other ways you can utilize it to its fullest potential:

Share the calendar with the entire staff. I add staff who are assigned to a specific task, like writing a blog post, to a calendar item so that it appears on their individual calendar as well as the communication calendar.

Track notes in the description box. At Western States Center, I kept track of topics for our e-news in the description field of the e-news calendar event. I would add topics if a story opportunity arose that we had not planned. This gave my co-worker who was in charge of publishing the e-news real-time updates. It was also far more efficient that sieving through emails and opening Word documents.

Assign tasks and set reminders. Once someone is given a task like writing a blog post, I share that calendar event with their individual calendar. Once it is in their personal calendar, they can set a reminder for themselves. This helps spread the responsibility of communications across the entire staff and allows each staff member to create the system of reminders that works best for them. Automatic reminders have helped me to sleep better at night!

Still be tactile. While I do rely on high-tech tools, I am also a tactile person. I often prefer using pen and paper to a computer. Electronic calendars still allow me to print a paper copy and scribe on it.

Shift movable actions around neatly. As a neatnik, I have found that physical poster calendars do not meet my standard of visual order. While using Post-it notes on a poster calendar is possible, the risk of them falling off is high. Electronic calendars keep everything looking orderly.

Search archive. Google Calendar has a powerful search function. If I need to look up the specific date for a certain action, it takes me only two seconds to find the answer.

I also transferred the notes into a management tool where I could track the details. This can be a spreadsheet, a Word document, a big poster calendar, an electronic calendar or a project management platform like Basecamp. I've also used Redbooth, Evernote and Teamwork.com. Pick one that everyone agrees on.

Google Calendar also worked well for my staff team. It enabled me to create a communications calendar separate from my individual calendar.

The accuracy of a system only matters if the system is actually used. Most importantly, pick a system that works for you and your team.

Persistence Pays

Even if everyone agrees to a specific tool, it still takes time for people to get used to it. New staff also need time to get familiar with the protocols. Do not give up just because you still need to remind people to check the calendar or use the features. Training and practice are essential for successfully adoption of a tool.

Create or Curate

If your organization is like most nonprofits, your staff are most likely stretched for time and resources. Consider curating, instead of creating, content. Curating is a process of selecting, organizing and presenting information on a particular topic. It is different from simply sharing or duplicating.

Curating is not only a great way to maintain frequent posting on social networks, it is also a way to collaborate with organizational partners and build good relationships with bloggers. For example, you can wrap up an action by compiling a list of contents such as blog posts, videos and pictures that you and your partner organizations have published. But do not just present a list, add context that connects to your work. And don't forget to attribute your sources.

IMPLEMENT PHASE

In this phase, I lean on my management tool to track my actions and tasks.

Use Your Tools!

I maintain the big picture by having upcoming monthly calendars on letter size paper in front of me, while staying on task by monitoring my weekly calendar on my computer. Reviewing the monthly actions, planning the weekly actions, and implementing the daily actions help me to stay on task.

Stay Grounded in Your Foundation

Your adrenaline may be pumping a little more during this implementation phase. Actions are happening and they're moving quickly. Remember to stay grounded on your foundation (see sidebar). Don't get distracted by what seems to be attention grabbing for the sake of receiving the most "likes" or retweets.

FOUNDATIONAL BLOCKS

Staying focused on the purpose of your organization not only prevents mission creep, it also helps you avoid potentially embarrassing mistakes.

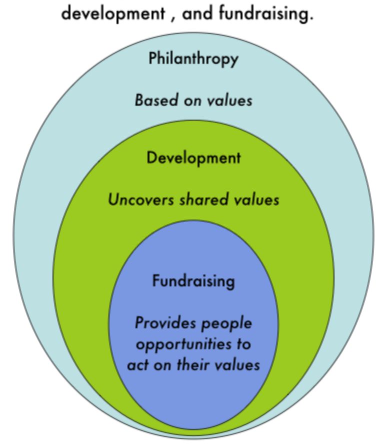
Rooted in Purpose

A manageable calendar is a sign of a good communication plan. A good communication plan should reflect a solid organizational plan. Whether your organization has a strategic plan or uses a strategic thinking process, your vision, mission, values and your theory of change should be embedded in all your strategies. They are not meant to live in a file folder or the cloud. Embed these statements in your work plans and carry them out in your daily conduct.

Communication is Development

In her book, *Beyond Fundraising: New Strategies for Nonprofit Innovation and Investment,* Kay Sprinkle Grace beautifully explains the relationship between fundraising, development and philanthropy. Development is not just a euphemism for fundraising. Fundraising is the act of asking for money. Development is the process of engagement and building relationship with your donors. Communication is an essential part of development. A good communication plan should also be clearly tied to your organizational fundraising and program plans.

Interrelationship of values-based philanthropy, development , and fundraising.



Source: Grace, Kay Sprinkle. *Beyond Fund Raising: New Strategies for Innovation and Investment in Nonprofits. Second edition.* New York. John P. Wiley & Sons, 2005.

A colleague once dared me to post a clever tweet she wrote. It compared a health guide we were trying to promote with a gay hook-up service. While some people might have found it humorous, it turned out that this hook-up service also had a history of racial discrimination. The lesson: all that glitters is not gold. Always remember your larger purpose.

Delegate to Integrate

Communication may not be high on your program staff's priority list if your organization has not completely integrated the communications work into the larger organization. Again, do not give up. Persistence pays off in the long term. Gentle reminders and patience are essential ingredients for developing an integrated communication culture.

At the Center, I gave program staff clear, accessible roles (e.g., take pictures with your smartphone while you are at an event). I

TYPES OF MEDIA: CHANNELS AND OUTLETS

Categorizing communication channels and outlets helps cut through mental clutter and clarify your top communication strategies. Below are two layers of channels and outlets from Altimeter. These are not universal definitions. You will come across other resources that may define these terms differently.

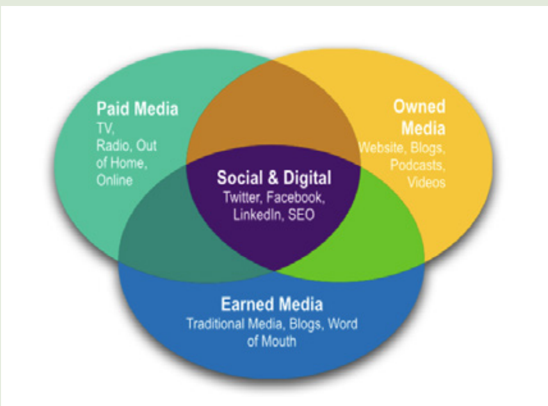
The channel and outlets you focus on depend on your organization type (advocacy, social services etc.), what your audience uses, and your staffing capacity.

Channels

One way to sort them out is by categorizing them into earned media (press), owned media (newsletters), paid media (advertising), and social media (social networks).

When I worked at United for a Fair Economy, earned media used to be synonymous with press media. This entailed building relationships with reporters and faxing press releases to newspapers, TV stations and radio stations. The democratization of information and the evolution of internet platforms have changed the game.

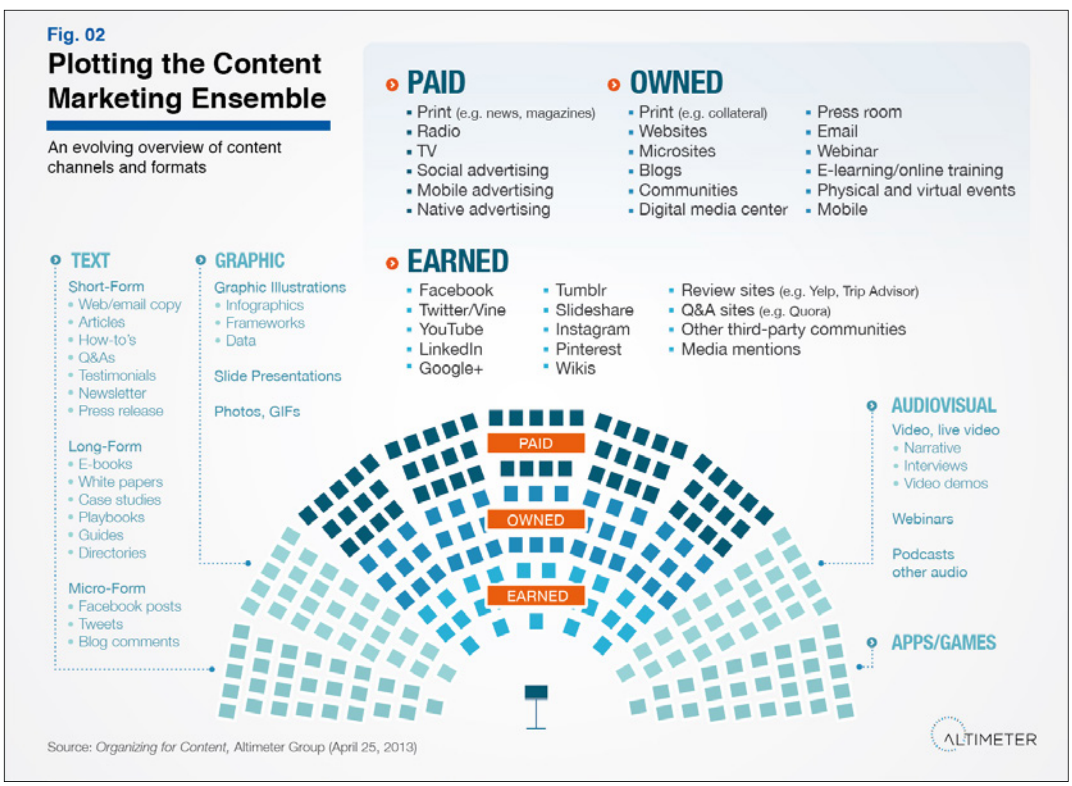
Newspapers and traditional airwaves are scrambling to stay relevant in this internet age. Reporters and news directors are no longer the only gatekeepers when it comes to getting your messages through the airways and web. The influence of followers and fans on social media plays a significant role in spreading your message. Social media has blurred the lines, creating overlaps that are well represented by this Venn diagram by Altimeter.



Outlets

Within these channels there are specific outlets (newsletters, specific social networks etc.).

I use Altimeter's categorization in my top level strategizing (getting first time donors to become annual donors) and Brandraising (see *Brandraising: How Nonprofits Raise Visibility and Money Through Smart Communications* by Sarah Durham) for specific tactics (organizing a phone bank to call first time donors to repeat their donations).



empowered them to post directly to our Facebook and Twitter pages. In the beginning, I monitored the activities closely to ensure that our message and language were consistent. I also provided feedback to improve our message consistency. Once the staff got used to it, I found myself monitoring less vigorously. Giving your staff clear roles is a good way to create an integrated communication culture and to increase the staff's feeling of ownership.

A communications system only works when you commit enough time to implement that system properly. Test things out so you can always adjust to your needs and your team's needs. Remember that planning, strategizing and implementing are not stagnant, terminable steps, but ongoing processes. The communications process is definitely not a linear process. I hope that these insights will help you create and manage a communications calendar that will lead you and your organization to even greater success. ■

For a compilation of resources that pertain to this article, including project management tools, visit: bit.ly/methodical-communicator

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