

Foundation Fundraising

*Webinar for
Combined Jewish Philanthropies of Greater Boston
June 2, 2021*

*Presenter: Lauren Brownstein
PITCH: Fundraising and Philanthropy Consulting*

Who is your presenter?



Lauren Brownstein
PITCH: Fundraising and
Philanthropy Consulting

Lauren Brownstein has been working in philanthropy for more than 25 years as a fundraiser, educator, program manager, and philanthropic consultant.

She has raised millions of dollars for museums, workforce development programs, student support organizations, community centers, environmental causes, social service organizations, and more.

Her areas of expertise include: foundation relations (grant writing, prospect research, donor cultivation and stewardship), corporate sponsorship, fundraising campaigns, and staff and board training.

Who is your presenter?



Lauren Brownstein
PITCH: Fundraising and
Philanthropy Consulting

President of PITCH: Fundraising and Philanthropy Consulting (pitchconsulting.com) for 17+ years.

Creator of the Small & Mighty Membership Program - resources for small(ish) nonprofits.

Foster parent and adoptive parent.

Relentless coronavirus arts & crafter (see recent blog entry on pitchconsulting.com for details!).

What we will discuss today:

Understanding your audience – who are foundation officers, boards, etc.

Key elements of a strong, memorable grant proposal

Creating an effective statement of need

Using data and/or stories to make proposals more memorable

What story does my budget tell?

Common proposal pitfalls and red flags

How can you get to know foundations if you don't already have an "in"?

Stewardship – Taking care of your current foundation donors

Objectives - by the end of this webinar, you will be able to:

Craft a compelling grant proposal that proactively addresses many of the questions that foundation officers/board will have.

Integrate stories, data, and other elements that will make your proposal more memorable for reviewers.

Identify, and avoid, common problems with grant proposals.

Articulate the “*so what?*” of your work – why your work/project matters.

Create a proposal budget that places your organization in the best light.

Cultivate relationships with new foundations, and take care of the foundation donors you already have.

Ground Rules

Participation and questions are encouraged!

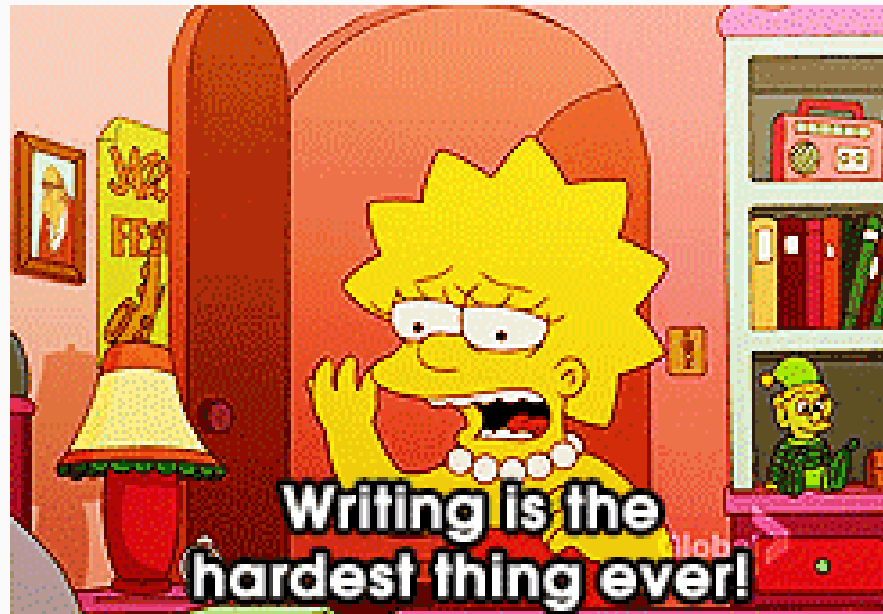
We will learn as one group, and we also will do some individual work.

We will take a quick break in the middle of our session.

If you need to take another break for personal needs - just do what you need to do.

What else?

Warm Up! Writing exercise



Agenda

Proposal Elements	Budget
Statement of Need	Red Flags
Data and Stories	Cultivation and Stewardship

What are the elements of a strong grant proposal?

The “ingredients” you (almost) always should include



Elements of a (typical) grant proposal

Introduction	1-2 paragraphs, include “ask” amount
Agency background	History, constituency/clients, experience with the issue(s), mission
Statement of need	What do you need to change?
Goals and objectives	Goals = more general. Objectives = measurable (e.g. numbers dates)
Project description and timeline	Here’s what will happen and when it will happen
Staffing	Who will be doing this, and what is their expertise?
Evaluation	How will you know you’ve accomplished what you set out to do? Who will help you figure this out?

Elements of a (typical) grant proposal

Budget	Substantive items first, no “miscellaneous”, do the math!
Sustainability	How will this program continue once this funder is no longer involved?
Donor recognition	How will you publicly thank the donor?
Conclusion	How will things be different because you have done this work?
Attachments	

How can I write
this so it will
stand out
from the pack?

Writing a zinger opening
sentence

[20 Things to Never Write in a
Grant Proposal](#)

Agenda

Proposal Elements	Budget
Statement of Need	Red Flags
Data and Stories	Cultivation and Stewardship

How should I focus the statement of need?

Make sure you are writing about the clients (and not just writing about your organization).

Back up your assertions with data (and include citations!).

Don't tell them what they already know.

Data matters; stories stick.

What's the "So What?"

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Applying principles of Behavioral Science to grant writing

Consider the scale of the problem.

Empathy systems work better when focused on ONE target.

Donors (and foundations) want to feel that they can be effective.

Identifiable individual pitches outperform statistical pitches.

Set completion bias.

Foundations want statistics (with citations!), but remember you are writing for a person...

Has your organization used any of these principles in your fundraising?

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Proposal Budget Tips (and pitfalls to avoid)

Substantive items first

Do the math

Look at Cost Per Unit

No miscellaneous

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Yikes!

What are the “red flags” and mistakes that will hurt your organization’s chances of securing a grant?



Pitfalls to avoid

Math that doesn't add up.

Grammatical or spelling errors.

Not answering all of their questions.

High CPU.

A statement of need that only focuses on your organization.

Misalignment with the potential donor's mission, guidelines, etc.

Mismatched budget and narrative.

Board that doesn't financially support the organization.

Agenda

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Cultivation and Stewardship

CULTIVATION = Getting to know new potential donors

- The goal: secure a gift

STEWARDSHIP = Taking care of the donors you already have

- The goal: honor their generosity, help them feel like a friend of the organization, make it more likely that they will give again and elevate their gift

Cultivation

Can be challenging with foundation officers

["No Unsolicited Proposals"](#) – there are things you can do!

How to get them on the phone

How to keep them informed, and inform yourself

How to show them what you're about

Stewardship

It is **ALWAYS** more effective and efficient to retain a donor than to acquire a new donor.

Required stewardship: reports, site visits, etc.

Proactive stewardship: site visits, phone calls, lunch invitations, newsletters, behind-the-scenes tours, personal notes...

Seven thank you's

“Ask for money, get advice. Ask for advice, get money.”

Resources I like

Chronicle of Philanthropy

BoardSource

JSocialMarketing.com (Julia Campbell)

Guidestar

Canva, Lumen5, Anchor

Candid. (and GrantSpace)

PITCHCONSULTING.COM

PITCH's Small & Mighty Membership Program



Small & Mighty Membership Program

Cut through the clutter, eliminate overwhelm, and raise more money with clarity and ease.

Members receive two sets of resources each month:

- **A tactical, how-to guide**, covering topics such as: grant proposal writing, keeping the donors you have, finding new donors, turning a fundraising “no” into a “maybe” or a “yes,” and more.
- **News & Views**: trends in fundraising, interesting articles, useful new data, and other highlights from the world of philanthropy.

Small & Mighty Membership Program

For participants in this webinar:

15% discount with code: CJP2021

if you join by Friday, June 4

Let's Stay in Touch!

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