

TABLE OF CONTENTS

Introduction	1
PART I: Understanding Corporate and Foundation Fundraising	5
How Corporations and Foundations Fit into Your Overall Fundraising Strategy	6
Why Corporations and Foundations Give	9
Foundations	10
<i>LOBBYING</i>	11
<i>FOUNDATION TYPES</i>	12
<i>THE NATURE OF FOUNDATION GIVING</i>	16
Corporations	17
<i>AVENUES OF CORPORATE SUPPORT</i>	18
<i>WHAT CORPORATIONS GIVE</i>	21
Implications for Fundraisers	23
PART II: The New Philanthropy	25
Giving Trends	26
<i>CURRENT EVENTS</i>	26
<i>GLOBALIZATION</i>	31
<i>DEMOGRAPHICS</i>	32
<i>THE NEW DONOR</i>	35
<i>IMPLICATIONS FOR GRANT SEEKERS</i>	36
Corporate and Foundation Funding in Perspective	37
<i>FOUNDATION GIVING TRENDS</i>	37
<i>CORPORATE GIVING TRENDS</i>	43
The Future	49
<i>COLLABORATION</i>	49
<i>GREATER CONTROL</i>	50
<i>TECHNOLOGY</i>	50
<i>VENTURE PHILANTHROPY</i>	50
<i>EFFECTING CHANGE</i>	51

PART III: Define the Project	53
Generate the Idea	53
“Mission-Fit”	54
<i>BRING YOUR CONCERNS TO THE TABLE</i>	54
<i>FUNDRAISING GOALS</i>	55
Is Your Organization Prepared?	57
<i>OWNERSHIP AND INVESTMENT</i>	57
<i>READINESS</i>	59
Project Development	60
<i>THE PURPOSE OR PROBLEM</i>	61
<i>PROJECT PLAN</i>	62
<i>RESOURCES</i>	65
Make Sure Everyone Is on the Same Page	66
 PART IV: Finding the Right Funders for Your Project	 67
What Makes a Good Prospect?	67
<i>CAPABILITY</i>	68
<i>INCLINATION</i>	68
Know the Landscape	68
<i>THE LOCAL LANDSCAPE</i>	68
<i>UNDERSTAND WHERE GIVERS GIVE</i>	70
<i>HELPFUL NEWSLETTERS</i>	71
<i>LISTSERVS (DISCUSSION GROUPS)</i>	73
<i>BUSINESS PUBLICATIONS</i>	73
Project-Specific Grant Searches	74
Search Strategy	75
<i>PERSONAL CONNECTIONS</i>	76
<i>GENERAL SEARCH ENGINES</i>	77
<i>FREE PHILANTHROPIC DATABASES</i>	79
<i>LOCAL LIBRARY: BOOKS AND ELECTRONIC DATABASES</i>	80
<i>INSTITUTIONS OF HIGHER EDUCATION</i>	81
<i>SUBSCRIPTION DATABASES</i>	82
<i>DIGGING FURTHER</i>	83
<i>FAMILY FOUNDATIONS</i>	83
<i>AFFINITY GROUPS AND RAGs</i>	84
<i>NARROW THE FIELD</i>	85
<i>GOVERNMENT FUNDING</i>	90
Your Final List	92

PART V: Approaching Funders	95
Make the Best Initial Approach	95
<i>PREPARE FOR THE APPROACH</i>	96
<i>THE BEST METHOD</i>	96
<i>THE BEST PERSON TO MAKE THE APPROACH</i>	98
<i>WHO SHOULD I APPROACH?</i>	99
Letters of Inquiry	102
<i>ADVANTAGES/DRAWBACKS</i>	103
<i>STYLE AND FLOW</i>	104
<i>COMPONENTS OF A LETTER OF INQUIRY</i>	108
<i>SAMPLE LETTER OF INQUIRY</i>	114
Other Forms of Communication	117
<i>CONCEPT PAPER</i>	117
<i>SAMPLE CONCEPT PAPER 1</i>	121
<i>SAMPLE CONCEPT PAPER 2</i>	123
<i>ONLINE AND EMAIL INQUIRIES</i>	125
<i>TELEPHONE CALLS</i>	131
<i>PERSONAL VISITS</i>	142
The Next Step	148
Handling Rejection	149
PART VI: Organize the Proposal	151
Roles and Responsibilities	151
The Outline	153
Proposal Production	154
<i>TIMING</i>	154
<i>GATHERING INFORMATION</i>	159
<i>APPROVAL PROCESSES</i>	160
<i>COMMUNICATION</i>	161
<i>DEVELOP A PROPOSAL PRODUCTION SCHEDULE</i>	161
<i>CONTINGENCY PLANS</i>	163
PART VII: Writing the Proposal	165
Your Unique Voice	165
<i>CLUES FROM YOUR ORGANIZATION</i>	165
<i>THE FUNDER'S PERSPECTIVE</i>	166
<i>LENGTH, STYLE, AND FLOW</i>	169
The Funder's Requirements	171
<i>APPLICATION FORM</i>	171
<i>PROPOSAL GUIDELINES</i>	172

Proposal Components	173
<i>COVER LETTER</i>	174
<i>COVER PAGE (OPTIONAL)</i>	177
<i>TABLE OF CONTENTS (OPTIONAL)</i>	178
<i>INTRODUCTION</i>	178
<i>ORGANIZATIONAL INFORMATION AND CREDENTIALS</i>	182
<i>STATEMENT OF NEED</i>	185
<i>PROJECT METHODS</i>	195
<i>BUDGET</i>	211
<i>CONCLUSION</i>	227
<i>ATTACHMENTS</i>	227
Nontraditional Proposal Formats	228
<i>LETTER PROPOSALS</i>	229
<i>ONLINE APPLICATIONS</i>	230
<i>COMMON APPLICATION FORM</i>	230
Submission Tips	231
<i>PACKAGING THE PROPOSAL</i>	231
<i>GETTING THE PROPOSAL THERE</i>	233
PART VIII: Proposal Review and Follow-Up	235
How Proposals Are Processed	235
<i>INITIAL SCREENING</i>	235
<i>A STAFF MEMBER TAKES OVER</i>	236
<i>FROM STAFF TO BOARD MEMBER</i>	236
<i>CORPORATE PROCESS</i>	237
<i>TIME FRAME</i>	238
Develop a Proposal Tracking System	239
<i>PROJECTS IN THE PIPELINE</i>	239
<i>DEADLINES AND DECISION TIMELINES</i>	239
<i>RECORD AWARDED OR DENIED GIFTS</i>	241
Follow Up on Your Proposal	241
Reply to the Funder's Decision	243
<i>SAY THANK-YOU</i>	243
<i>HANDLE A DENIAL</i>	245
<i>PARTIAL REQUESTS</i>	249
<i>CONGRATULATIONS: YOU'VE BEEN FUNDED</i>	250
PART IX: Effective Stewardship	253
Recognize the Funder	254
<i>SHOW GRATITUDE</i>	255
<i>PUBLICIZE THE GRANT</i>	256

Communicate About Your Project	256
<i>THE FUNDER'S EXPECTATIONS</i>	257
<i>SHARE YOUR SUCCESS</i>	258
<i>RELATIONSHIPS WITH CORPORATE AND FOUNDATION REPRESENTATIVES</i>	259
<i>PROGRESS REPORTS</i>	259
Project Pitfalls	262
<i>YOUR PROJECT MANAGER DOESN'T DELIVER</i>	262
<i>YOUR HYPOTHESIS IS WRONG</i>	263
<i>YOUR PARTNERS HAVEN'T DONE WHAT THEY PROMISED</i>	263
<i>THE PROJECT MANAGER IS LATE WITH A REPORT</i>	263
Develop a Stewardship Tracking System	264
<i>A USEFUL TRACKING SHEET</i>	264
<i>STEWARDSHIP RESPONSIBILITY</i>	264
Build on Your Success	266
Appendix A: Sample Proposal	267
Appendix B: Proposal Forms	281
Common Grant Application.....	281
Online Application.....	286
Appendix C: Characteristics of an Effective Fundraiser	291
List of Characteristics	291
<i>PERSONABLE</i>	291
<i>PASSIONATE</i>	292
<i>A GOOD LISTENER</i>	292
<i>TRUSTWORTHY</i>	293
<i>PERSISTENT</i>	293
<i>CREATIVE</i>	293
<i>ENERGETIC</i>	293
<i>LEADERLY</i>	293
<i>GOAL ORIENTED</i>	294
<i>CONFIDENT</i>	294
<i>CURIOUS</i>	294
<i>MOTIVATED</i>	294
<i>MATURE</i>	294
<i>RESILIENT</i>	295
<i>MULTITASKER</i>	295
<i>TEAM ORIENTED</i>	295
<i>ORGANIZED</i>	295
<i>RESOURCEFUL</i>	296

<i>PERSUASIVE</i>	296
<i>ETHICAL</i>	296
<i>KNOWLEDGEABLE</i>	297
A Word About Recognition	298
Career Advice for Current and Prospective Fundraisers	298
Appendix D: Government Grants	301
You Must Have a Well-Defined Plan	302
The Proposal Process Is Much More Restrictive	302
An Agency Person Is Available for Questions	303
Government Agencies Require More Documentation	303
The Approval Process Is Clearly Defined	303
Budgetary and Payment Processes Differ	304
Glossary	307
Index	311