

Demonstrating the Fit

Making First and Lasting Impressions

Stop! Take your fingers off the keyboard and step away from the computer monitor.

Before you write that first word in a letter of inquiry or grant proposal, you must assess whether or not your agency (and the program or project you're seeking funding for) is a good fit with the grantmaker. If you've determined that the fit is solid, then you may return to the computer and begin writing. However, if you're unsure or have doubts, you either don't have a strong match or you'll need to investigate further to determine if you do.

FITNESS IS FOUND IN THE GUIDELINES

Grantmakers want to make it as easy as possible for potential applicants to figure out whether or not they should apply for funding. This is because funders do not want to receive a lot of proposals that are not aligned with their funding priorities and therefore fall outside their guidelines. That's why the majority of grantmakers publish guidelines on their Web sites or in a hard copy format that can be snail-mailed to potential applicants.

It is essential that you obtain a copy of a funder's *most current* guidelines and thoroughly review them before beginning to prepare a grant application. Guidelines will help you determine whether or not your agency (and the program or project for which funding is sought) fits like Cinderella's slipper with a given funder. This is because most guidelines are pretty clear about specifying what the grantmaker will or will not fund.

Before a foundation, corporation, or other grantmaking entity awards its very first grant, the decision makers at the funding agency will have thoughtfully considered, internally debated, and ultimately concluded what types of nonprofit agencies, programs, and projects will be eligible for funding. Decisions can be driven by the interests of the founders or by an awareness of urgent community needs. Even with the very largest grantmakers, it is impractical to open the doors to every type of nonprofit agency anywhere in the world. Instead funders focus. They focus on addressing specific problems or unmet community needs. They set geographical limitations. They limit funding to certain types of financial requests (for example, general operating support, program or project, capital and equipment, endowments, scholarships, and the like). These preferences are almost always specified in a funder's guidelines. "*Fit*" is an alignment with these preferences.

In addition to reading the guidelines, you should also review a list of a funder's current and recent grantees. These grantee agencies already have successfully proven their "fit" with the funding agency. Who and what has been funded in the recent past is an excellent indicator of who and what the grantmaker is likely to support in the near future. Please keep in mind that grantmakers can and do change their funding priorities, which is why we obtain *current* guidelines and review *recent* grantees.

"The proposal writer should take time to investigate the guidelines and look at past grantees to assess the likelihood of consideration," says Lori McGlinchey of the Open Society Institute.

THE FOUR FITNESS FACTORS

Several factors determine fit. The most important are subject matter, geography, type of financial need, and grant amount. When evaluating a foundation, corporation, government agency, or other grantmaker as a potential grantor for your agency, consider the following questions:

1. Is your agency's mission and purpose a funding priority of the grantmaker?
2. Does the grantmaker fund in the geographical area where your agency is located or where it serves its clients?
3. Does the grantmaker make grants for what your agency seeks funding for—for example, general operating support, program or project support, scholarships, endowment, capital improvements, and so forth?

4. Does the dollar amount your agency seeks fall within the range of grants typically awarded by the grantmaker?

If—and only if—you answered yes to each of these questions, then there is an apparent alignment between your agency and the grantmaker. Now you may proceed to approach the funder for support by writing that letter of inquiry or a full proposal. The format of the initial approach, whether a letter of inquiry or formal proposal, depends on the preference of the grantmaker.

Some grantmakers require that a letter of inquiry precede the submission of a formal proposal. Generally, these letters are one to three pages in length and are used by the funder as a screening device. Successful letters of inquiry will be rewarded with an invitation to the nonprofit organization to submit a full proposal. Recipients of unsuccessful letters of inquiry need not apply.

In your initial written submission to a funder, be it in a letter of inquiry or a full proposal, it is essential to demonstrate fit and to make a positive first impression. Then the question becomes this: To what extent should applicants go to demonstrate that their nonprofit organization and program or project is a good fit with a potential funder?

PARROT BACK?

Conventional wisdom may tell us to mirror the language in the funder's guidelines. Parrot back the grantmaker's own words is the advice offered by many trainers of grantwriting workshops and in dozens of books on "how to write successful grant proposals."

This is precisely the advice followed in the following example. Read the guidelines for the fictitious Anderson Family Foundation and then the responding letter of inquiry from the fictitious nonprofit organization, Bridges to Nature. As you read, consider whether the writer has adequately demonstrated the fit and made a positive first impression.

SAMPLE FOUNDATION GUIDELINES

In the pages ahead, the potential grantee is responding to the following guidelines from the fictitious Anderson Family Foundation.

ANDERSON FAMILY FOUNDATION: GUIDELINES FOR APPLICANTS

Who We Are

The Anderson Family Foundation is a small but growing family foundation that strives to make a difference in the local community, which has been home to four generations of Andersons. Our values are expressed in our grantmaking, which emphasizes enlightenment of the mind, empowerment of the individual, nurturing of creativity and expression, and respect for and appreciation of nature and wildlife. To this end, we are dedicated to the well-being of children and youth, with special interest in programs that cultivate a better understanding of the natural world and foster creativity. The Foundation takes an avid interest in safeguarding our environment for future generations. Environmental education is critical if society is to preserve and protect natural resources. We believe that each individual can make a difference, and although society's problems can appear overwhelming, we see great hope in the enthusiasm, creativity, and intelligence of young people. The Foundation seeks opportunities where small and medium-sized grants can have a deep and lasting impact.

What We Fund

- Nonprofit agencies and their programs that (1) benefit children and youth, particularly young people from low-income households and those at risk within the Greater Urban City four-county area (Forest, Hill, Marsh, and River Counties) and (2) provide environmental education to children and youth
- General operating, program, and project support
- Grants in the range of \$10,000 to \$50,000
- Agencies that do not discriminate against any person or group on the basis of age, race, gender, ethnicity, disability, religion, national origin, political affiliation, or sexual orientation
- 501(c)(3) organizations or those with a fiscal sponsor

What We Do Not Fund

- Capital campaigns, endowments, scholarships, individuals, films, videos, conferences, or fundraising events
- Multiyear funding requests

What Is Our Process

The Foundation accepts two-page letters of inquiry throughout the year. Those selected will be invited to submit a formal application.

Send letters to:

Judi Smyth
Grants Manager
Anderson Family Foundation
100 Main Street
Suburbia, CA 90000-0001



Letter of Inquiry to the Anderson Family Foundation

January 30, 2006
Ms. Judy Smith
Grants Manager
Anderson Family Foundation
100 Main Street
Suburbia, CA 90000-0001

Dear Ms. Smith:

I am writing this letter of inquiry to the Anderson Family Foundation to tell you about Bridges to Nature, a unique and innovative 501(c)(3) not-for-profit organization that serves the Greater Urban City four-county area. Bridges to Nature is a wildlife sanctuary with year-round programming that educates children and youth about our natural world and fosters their creativity. We believe that Bridges to Nature is a good fit with the Anderson Family Foundation because our programs enlighten the mind, empower the individual, nurture creativity and expression, and teach respect for nature and wildlife. If invited to submit a full proposal, we would request grant funding of between \$10,000 and \$50,000. These funds will have a deep and lasting impact on the at-risk and disenfranchised youth we serve.

At Bridges to Nature, we seek to safeguard nature and wildlife from suburban development, and inspire future generations to preserve and protect our natural resources. Founded in 1985, Bridges to Nature is celebrating our 20th anniversary of providing young people with a better understanding of the natural world. We believe that each individual child can make a difference. While problems such as suburban encroachment and rampant development, and the accompanying loss of wildlife habitat and wildlife itself, can appear overwhelming, we see

great hope in the enthusiasm, creativity and intelligence of young people.

Bridges to Nature needs grant support to underwrite the costs of our educational programs for low-income and at-risk youth. Since our founding, we have opened our sanctuary gates to hundreds of school groups. Schoolchildren visit our beautiful 350-acre site located in forested hills that are populated by dozens of varieties of birds, deer, raccoons, skunks, bobcats, and the occasional mountain lion. Though Bridges to Nature is only a 30-minute drive from Urban City, the majority of low-income and at-risk youth have never experienced it. We introduce these young people to a whole new world that is beyond their daily experience. Our short-term goal is to provide children with an understanding of, and appreciation for, nature that they will cherish all their lives. Our long-term goal is to develop citizens who will help safeguard our environment for future generations.

Severe cuts have had a negative affect on school district budgets, causing many schools to eliminate field trips because bus transportation and related expenses cost too much. Bridges to Nature seeks grant funding so school children in poor and under-funded school districts continue to have opportunities to visit nature. We have to raise at least \$10,000 in support to sustain this program in the coming year, as current grant funding is about to run out.

We hope that the Anderson Family Foundation will want to learn more about Bridges to Nature. Please advice us as to whether we should submit a formal grant proposal. Thank you very much for your consideration.

Sincerely,

Chiaki Yamamoto-Barron

Chiaki Yamamoto-Barron, Executive Director

Problem Number One: No Fit-Ness

There are several problems with this sample letter. Let's begin with how the letter attempts to demonstrate fit. See how the applicant repeats the funder's exact words and phrases almost to the letter.

- “enlighten the mind, empower the individual, nurture creativity and expression, and teach respect for nature and wildlife”
- “We believe that each individual [child] can make a difference”
- “While problems . . . can appear overwhelming”
- “[These funds will have] a deep and lasting impact.”

It's almost as if the foundation officer rather than the grant applicant wrote the letter, for it tells us more about the foundation than it does about Bridges to Nature. This letter doesn't give us any feel for the agency's personality and passion. It doesn't talk about the people involved or what the youth participants in Bridges to Nature do when they visit the sanctuary. Certainly, the letter doesn't capture the essence of Bridges to Nature and captivate the reader. This is one of the dangers in simply parroting back the funder's own words.

What this letter offers is an excellent example of *TELLING* about fit without really *SHOWING* it. That's a serious omission. The best stories (and we believe that letters of inquiry and grant proposals should tell good stories) are those that *show*, not *tell*.

Are we flying in the face of conventional wisdom? According to each of the survey respondents who commented on this topic, the conventional wisdom is wrong. Here's what a few of the funders had to say:

“I know every grantwriter is told to mirror the language in an RFP [Request for Proposal]. I have found that more often than not, the more mirroring of language there is, the less actual fit there is.” (Aaron Jacobs, Program Officer, Social Venture Partners, Seattle)

“Mirroring the language in the guidelines tells me that they are trying to fit, but makes me wonder if they have really thought about that fit.” (Mary Gregory, program officer at Pacific Foundation Services, a small San Francisco firm that manages eight family foundations)

“They should write as if they have read our guidelines, but without parroting what we have said.” (Sandra Sinclair, The J. W. McConnell Family Foundation)

Further, Ricardo Millett of the Woods Fund of Chicago notes that his pet peeve is those “grantseekers who mimic foundation language and fail to advance their ask in their own authentic language and experience.”

GRANTWRITING TIP!

Telling a grantmaker your agency is a good fit is *never* as strong or convincing as *showing* that your agency is a fit.

Problem Number Two: First and Lasting Mis-Impression

There are other problems with the ugly duckling letter of inquiry from Bridges to Nature to the Anderson Family Foundation. The most notable of these is the poor first impression it makes, for two reasons. First, the writer failed to spell the grants manager’s name correctly. As clearly stated in the guidelines, her name is *Judi Smyth*, not *Judy Smith*. Second, there are several glaring errors in the body of the letter. No doubt the writer meant *rampant* not *rampart*, *advise* not *advice*, and *effect* not *affect*. But these mistakes could have been avoided if the writer had paid more attention to the details. And the devil’s always in the details!

Attention to detail is critical in proposal writing. Use the spell check function on your computer. Proof your own copy, and then have another pair or two of eyes proof it as well. And *always* double-check the spelling of the program officer’s name—and the name of the foundation too!

We asked the funders we surveyed what their pet peeves in grant proposals were. Several mentioned misspellings, poor grammar, and cover letters that begin with “Dear Sir or Madam” rather than with the program officer’s name.

“When proposals haven’t been proofed and another foundation’s name is in the proposal.” (Nancy Wiltsek, Pottruck Family Foundation)

“Requests that do not include contact information—address and telephone numbers—or are addressed to another program officer reflect that they have not read our guidelines.” (Mario P. Diaz, Wells Fargo Foundation)

Although none of our respondents indicated that these errors standing alone were fatal flaws—misspellings, poor grammar, and getting the program officer’s name wrong—they do not make a very positive first impression, and they may leave a lingering poor one. They may raise doubt in the funder’s mind about

whether or not the applicant agency also will be careless in delivering client services or in managing grant funding wisely. Given the competitive grants environment, why plant seeds of doubt?

GRANTWRITING TIP!

Spend a few extra minutes checking and proofing your work!

Problem Number Three: Where's the Zing?

The third major problem with the “before” letter concerns writing style and word choice. The writing is generally flat and uninspired. The letter lacks a strong opening sentence to engage the reader and segue into a compelling, persuasive story. “I am writing this letter . . .” is at best serviceable, but certainly not engaging. Sentences lack energy. Overall, the language is rather ho-hum and not likely to grab the attention of a program officer who is reading through a stack of a hundred or more letters of inquiry. Your letter has got to stand out!

Problem Number Four: Where's the Beef? and How Much Is It?

In addition to lacking zing, the letter also lacks relevant, substantive details. The reader is not told how many school children have been served by Bridges to Nature in prior years nor how many will be served in future months. No name is provided for the program for which funding is sought. There are no specifics regarding the transportation costs. No information is given about how the program was started and its financial history.

The letter fails to specify an exact grant amount, should the agency be invited to submit a full proposal. Rather, it simply repeats the Anderson Family Foundation's stated grant range of \$10,000 to \$50,000. In the second to the last paragraph, it is curious that the letter mentions that grant funding is about to run out but fails to mention who previously has been funding the program.

One of the cardinal rules of successful grantwriting is to leave no obvious question unanswered. Aren't you left at the end of this letter with unanswered questions?

TIME FOR A MAKEOVER

Fortunately, these problems are not hard to fix. Take a look at the following “beautiful swan” version of the Bridges to Nature letter to the Anderson Family Foundation.



Letter of Inquiry to the Anderson Family Foundation

January 30, 2006
Ms. Judi Smyth
Grants Manager
Anderson Family Foundation
100 Main Street
Suburbia, CA 90000-0001

Dear Ms. Smyth:

Many low-income and at-risk children living in Urban City have never seen a deer in the wild or fresh bobcat tracks in the soft dirt. At Bridges to Nature, a wildlife sanctuary and education center located a mere 30 minutes from Urban City, we give these young people an opportunity to experience nature—up close and personal!

I am writing to the Anderson Family Foundation to tell you about Bridges to Nature and our outstanding education programs. After reviewing your current guidelines, I believe that our agency is a good fit with the Foundation's funding priorities. If invited to submit a full proposal, we will ask the Foundation for a grant of \$15,000 to help support our Busloads to Bridges program. This program enables underfunded schools and school districts in the Greater Urban City four-county area, though primarily in Urban City, to send school groups to Bridges to Nature.

Bridges to Nature is a 501(c)(3) not-for-profit organization founded in 1985, when the Fisher family donated 350 acres to the new agency with the stipulation that the land be held in perpetuity as a wildlife sanctuary and environmental educational center. Our educational center and small wildlife museum are housed in what was formerly

the Fisher estate home. Agency offices are found in several small outbuildings near the main center.

For 20 years, Bridges to Nature has offered a variety of environmental education programs geared to elementary and high school students. We estimate that Bridges to Nature has served more than 60,000 students in the past 20 years, or an average of about 3,000 students per year. Approximately 40% of the visiting students come from low-income households. The majority of our programs are daylong visits to our sanctuary, which combine hands-on nature experiences with classroom learning. We also provide teachers with pre- and post-visit curriculum materials, which enhance the student's visit. In addition to our one-day program, Bridges to Nature also offers several multiday and weeklong options.

Several schools have brought their students each year since our educational programs were first offered. However, in recent years, we started hearing from principals and teachers that schools could no longer afford to participate due to severe budget cuts that eliminated costs such as bus rentals and even modest participation fees. Hardest hit were schools in low-income communities, especially those in Urban City, where children were the least likely to have opportunities for excursions outside the city or even outside their immediate neighborhoods. Without Bridges to Nature, these students would miss the chance to experience and learn about the natural world that exists just outside the city limits.

To meet this need, Busloads to Bridges was created three years ago with a three-year \$100,000 seed grant from the Urban City Community Foundation. This funding enabled Bridges to Nature to underwrite the cost of bus transportation and group participa-

tion fees for those schools otherwise unable to bring student groups out to the sanctuary. The program has been a huge success, as all underwritten spots filled within a few weeks after notices were mailed to local schools. However, Bridges to Nature is now in the third year of the three-year grant from the Community Foundation, and we must secure new grant funding if we are to continue this worthwhile program, which is why I am writing to the Anderson Family Foundation. A grant of \$15,000 would enable us to underwrite school visits for ten classrooms. The average daily bus rental rate is \$500, and our full-day student group rate is \$500. Student groups average between 20 and 30 children.

For a child who has never before seen a wild male turkey in full plumage, a visit to Bridges to Nature can be an eye-opening experience. I hope you will want to learn more about Bridges to Nature and will invite us to submit a full proposal. If you have any questions or need additional information, please feel free to call me. Thank you very much for considering our letter of inquiry.

Sincerely,

Chiaki Yamamoto-Barron

Chiaki Yamamoto-Barron
Executive Director

LETTER OF INQUIRY MAKEOVER: A PRETTIER PICTURE

This “after” version is much improved. The first sentence grabs the reader’s attention with vivid mental pictures of “a deer in the wild” and “fresh bobcat tracks in the soft dirt.” The program’s name is provided. As a program name, *Busloads to Bridges* is both descriptive and clever. What an agency *calls* a program is important for many reasons. A name conveys information about the specific nature and activity of the program, and it also becomes verbal “shorthand” both inside and outside the agency. Therefore, careful consideration should be given to the selection of a program name.

In the revised letter, the specific amount of grant funding sought, in this case \$15,000, is given. This demonstrates that the agency carefully reviewed the foundation’s guidelines, saw the typical grant range, and wisely selected to request an amount within that range. As a strategic decision, the fact that the ask amount is in the lower half of the range is probably a wise one for a first-time applicant, as funders frequently award larger grants to renewing grantees. The ending completes the circle, returning the reader to a sharp visual image of “a wild male turkey in full plumage.”

The makeover version of the letter also provides a bit of the agency’s history, as well as information about how the program began and where funding has come from. The program itself is described with just enough relevant details for a letter of inquiry. Hard numbers show results. For example, the fact that 60,000 students have participated in the Bridges to Nature program over its 20-year history is important and relevant. A strong letter of inquiry will discuss the problem to be addressed (in this case, low-income school children who have little opportunity to experience nature and who attend school in a district that cannot afford transportation costs to take students on field trips) and the agency’s proposed response (providing low-income school children with grant-funded transportation to the nature sanctuary). This letter has met both of these criteria.

Throughout the letter, the writing style and tone are also much improved. There is a faster-paced energy that was lacking in the before version. The writer has made better word choices. Each sentence pulls the reader forward to the next sentence. Yet because this is a brief letter of inquiry, there are no wasted words or sentences. But there is passion. The reader gets a feeling for the agency and a clearer idea of what the participating students do when they visit the sanctuary.

Unlike the earlier, weaker version, the revised letter answers all of the reader's obvious questions. The goal is to pique the funder's interest by providing just enough of the most relevant information, making it more likely that the funder will want to learn more and will invite the submission of a formal proposal.

Finally, the makeover version achieves the primary objective of every letter of inquiry: it demonstrates that the agency and the program fit within the grantmaker's funding priorities. And it achieves this by *showing rather than telling*.

WRAPPING UP THE FIT

Our objective for this chapter has been to help you understand the importance of demonstrating your agency's "fit" to a funder and how to do it well. Saying you fit is not enough. You must convince the grantmaker that there is an alignment of interests, and you do this by describing your agency, its mission, the unmet need and clients to be served, and how the program will fulfill this need. Let the funders be your guide:

"It really comes down to communicating strong ideas and vision clearly and succinctly." (Liesel Fenner, New England Foundation for the Arts)

"Often, connecting the proposal to the Fund's guidelines is my job," Frances Phillips, of the Walter and Elise Haas Fund, says. "I have to interpret and translate the organization's work within the foundation's priorities. It helps if the organization points to where they see the fit, but I don't want to sacrifice my opportunity to understand their mission and how diligently and thoughtfully they are addressing it."

