Sealing the Deal: Making a Compelling Case for Funding with Private Foundations

Welcome!

The webinar will begin at 2:00 p.m. CT
TEXAS HISTORICAL COMMISSION!
REAL PLACES TELLING REAL STORIES
• The Museum Services Program provides support, resources, and training to museums in Texas.
  • Consultations
  • Webinars and workshops
  • Resources
THC Museum Services

www.thc.texas.gov/museum-services

• On our webpage:
  • Webinars
  • Workshops
  • Grants and Fundraising
  • Helpful Resources
  • Connect and Learn
THC Museum Services

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• Bringing Objects & Artifacts to Life  
  * Thursday, February 27, 2:00 p.m. CT

• Appraising and Insuring Historical Treasures  
  * Tuesday, March 3, 2:00 p.m. CT

• Social Media and Your Cultural Organization: Where to Start  
  * Tuesday, March 24, 10:00 a.m. CT
Sealing the Deal: Making a Compelling Case for Funding with Private Foundations

Texas Historical Commission Webinar
February 11, 2020
Quick poll:

Have you written a grant before?
Discover and Locate Potential Funders

- Grants and Fundraising resources on the THC website
- Candid (formerly the Foundation Center)
  - Funding Information Network
  - The Foundation Directory Online
  - Profiles for over 166K foundations
- Always carefully review their website if one’s available

All resources mentioned in this webinar are listed on the Resources document with links.
Quick poll:

How many people have used the Foundation Directory Online?
Discover and Locate Potential Funders: Using The Foundation Directory Online
Discover and Locate Potential Funders: Using The Foundation Directory Online

Find Funding: Grantmakers

SHOWING GRANTMAKER RESULTS FOR "Arts and culture, Texas (United States)"

Subject Area: Arts and culture
Geographic Focus: Texas (United States)
Population Served: Who will be affected. Ex: At-risk youth, Veterans

Organization Name: Name of specific grantmaker or recipient
Location: Location of grantmaker or recipient
Who’s Who: Someone serving in organization

Include U.S. Federal Funders

Grantmakers (4,125)

GRANTMAKERS FILTERS
- Past Funders Filter
- No filters applied
- No limit on assets or giving

Assets $0 - $100,000,000...
Total Giving $0 - $100,000,000...

Include Exclude Only

Chat with an Expert

Search
Discover and Locate Potential Funders:
Using The Foundation Directory Online

Dodge Jones Foundation
Abilene, TX, United States | Who's Who | + Contact Info

Dodge Jones Foundation Most Recent 5 Years At A Glance
They've funded 667 grants to 263 organizations totaling $29,434,182

What Is Being Funded?

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Education</td>
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<tr>
<td>Health</td>
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<tr>
<td>Sports and recreation</td>
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<td>Community and economic development</td>
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<td>Science</td>
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<td>Public affairs</td>
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<td>Human services</td>
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<td>Arts and culture</td>
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<tr>
<td>Philanthropy</td>
<td>$1M</td>
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<tr>
<td>Information and Communications</td>
<td>$1M</td>
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</tbody>
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Where Is The Money Going?

![Map showing grant distribution across the United States]

How Big Are The Grants?

![Bar chart showing grant amounts]

View Each Subject with More Detail
View Each State with More Detail
View Each Grant with More Detail
Is it a good fit?

• Do they accept unsolicited proposals?
• Do their goals align with yours?
• How will your proposal meet their program goals?
• When do they meet and review grants?
• What can you find out from their 990? (let’s take a look at one)
Quick poll:

Are you familiar with the IRS 990 form?
The beautiful 990

• If you have a name of a foundation, you can get their 990s from Guidestar
• Compare the submission guidelines to their profile
• Double check whether they accept unsolicited
• If you can’t easily get to a location with the Foundation Directory Online, there’s much useful information here for you
• Let’s look at one briefly
Approaching a foundation

• Call them. I repeat: CALL THEM.
• Unless they say not to do this
• Get a meeting if you can
• Leverage your board or other connections for introductions
• If they only give to pre-selected, this would be your only way in
What are they looking for?

**Every** foundation is different, every single one. A proposal format could be:

• A Letter of Inquiry (LOI)
• An online submission form
• An application package
• A list of questions they want addressed in a written proposal to be mailed
• Any attachments they want to see

Let’s look at some examples:
What are they looking for? The Letter of Inquiry

- Always state the amount you need
- No more than two pages
- Components
  - Intro/Executive summary
  - Organization description
  - Statement of need
  - Methodology of project/need/workplan
  - Other funding sources
  - Final summary

What are they looking for? Online Forms

- Name of Organization
- Contact Info
- Primary County where services provided
- Project Title
- Organization’s purpose and history
- Describe the nature and extent of the problem you will address
- How does this proposed effort relate to the Foundation’s program goals
- Describe how the population to be served has previously been involved or will be involved in developing solutions

- Program objectives and evaluation
  - Evaluation criteria
  - Evaluation methods
  - Information to be collected
  - How info collected
- Plan of work
- Project start and end date
- Personnel responsible for program
- Estimated cost for the project
- Amount requested from Foundation
- Rational for amount requested
What are they looking for? Attachments they may possibly ask for all, some, none of these, or for others!

- IRS determination letter proving non-profit status
- Latest audit
- Last 990s
- Complete organizational budget
- Project budget
- List or bios of board members
  - What proportion donate?
  - Diversity of board
- Demographics of audience served
Making a compelling case: the groundwork

- Be prepared and do the homework
- Follow directions
  - cross the t’s, dot those i’s
- Provide thoughtful responses to questions
- Put your best foot forward
- Make it easy for the reviewer
Making a compelling case: the narrative

- Tell a story
  - State the problem
  - How will you solve this issue?
  - How will their support make a difference moving forward?
- Add an interesting anecdote
- Feature a person who will benefit
- Make it clear – you have the resources and personnel to accomplish all this
Making a compelling case: make it strong

• Be clear, concise, and to the point
• Bullet points are your friend
  • Workflow
  • Methodology
• Don’t use jargon
• You are writing for a lay person
• Action verbs, action verbs, ACTION VERBS
• Keep an online thesaurus open while you write
• Less words are better
Making a compelling case: get feedback

- Have non-experts read your proposal
- Have experts read your proposal
- Have grammar goddesses and gods read it
Advice: the road to success is paved with some failures

- You can do this
- Don’t give up
- Try, try again
- Don’t take it personally
Questions?

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