PREPARING YOUR APPROACH

Before You Begin

Before approaching any potential funder, researching grants or writing your first proposal, you need to understand a few basic fundraising rules and do some planning. This section will guide you in your preparations by providing instructions on:

- Developing supporting materials
- Preparing yourself
- Making the call
- Making the ask
- Developing written proposals

Supporting Materials

Once you have developed a clear, concise description of your overall program and individual pieces of your work plan, you should modify it to meet individual funder's needs. Some will require a letter, a one- to two-page summary or a fully developed proposal. No matter the specific funder's requirements, it will help to prepare supporting materials that articulate the core messages of your CKF project (see Appendix H: *Covering Kids & Families* Core Talking Points on p. x), including:

- An overview of your *Covering Kids & Families* project (one to two sentences)
- A description of the issue as it relates to your state or community, including available data such as:
  - The number of children without health insurance and a description of who they are
  - The impact this lack of health coverage has on their lives
  - The impact on the larger community (e.g., loss of productivity because parents miss work, cost of providing care)
- The specific objectives (measurable, achievable outcomes) you want to accomplish in your community
- Your plan of action to help alleviate these problems, and why your staff and board are qualified to tackle these problems
- Success you have had working toward your goal (including a reduction of the number of uninsured)
- The amount of funds you need to raise and the amount you are seeking from this funder

Preparing Yourself

The terms "philanthropy," "altruism" and "charity" can be misleading to a fundraiser because they connote a sense of powerlessness on the part of the nonprofit. Corporations, foundations and governments regularly invest in their communities and seek partnerships that will make their investments more effective. Your role with *Covering Kids & Families* is to provide the "sweat equity" to improve the lives of children, families and the community as a whole. With that in mind, fundraising becomes the process of developing partnerships with likeminded investors. Your CKF project merits their investment.

It has been mentioned previously and it is important to mention again: Even if you have no formal fundraising experience, you are the best person to make the request for funds. By capitalizing on your knowledge, experience and passion for your work, you will be able to communicate the value of CKF to potential donors.

When a prospect says "yes" to your request, you will experience an incredible rush. Odds are you will hear "no" more often than "yes," but the positive feelings you receive from each yes will refuel you.

Making the Call

It may take a few calls to find the most appropriate contact, but once you are speaking with the right person, the process can move quickly. Tips for making calls include:

- *Schedule calls*. Scheduling a time to talk with a representative of a potential funder not only helps you prepare, but shows them you respect their time. No one likes to receive unexpected telephone solicitations. Scheduling the call is a courtesy and puts your name on the contact's calendar. Recruiting calls last, on average, between five and 10 minutes, depending on the interest the contact shows and the questions they ask. Never call a potential funder if you have less than 15 minutes free.
- *Be prepared to make an ask*. Have your core program and funding points in front of you when you make your calls to help you stay focused.
- *Practice the message you will leave on voice mail if the contact is not available*. This is very important. Speak clearly, keep the message brief, and leave your name and phone number *at the beginning of the message* so the recipient does not need to listen to the entire message a second time to retrieve your contact information. Repeat your name and number at the end of your message.
- *Be mindful of your listener*. Make sure that your contact has time to talk before you start your explanation. This may present the opportunity to formally schedule the call for a later date, when the contact is more inclined to give their undivided attention. At the beginning of your conversation, ask your contact if they are familiar with SCHIP or Medicaid and adjust your core points accordingly.
- *Use a conversational tone*. Do not read directly from your core points. Explain your program briefly in simple terms. You can fill in the details later.
- *Show your enthusiasm*. Convey your excitement about the opportunity to work with the prospect you are calling. Smile when you are talking. It will make your voice sound happy, making the funder more inclined to listen.
- *Mention any direct connection you have to the funder*. If your contact has agreed to it, mention your connection by name. This may put the funder at ease and make for a more pleasant conversation.

Tip: Leaving a Voice Mail Message

If you think the likelihood of your contact calling you back is low, think about how much information you leave on a voice mail message. Consider leaving just your name and number without a lot of details concerning why you are calling. This may prompt them to call you for more information.

Making the Ask

Cultivating donors is a very dynamic process. It is difficult to predict the exact point at which you will make the specific ask for funding. Intuition plays a large role. Here are a couple of tips to guide you:

- Do not mention money until you feel you have "sold" a prospect on your program. Having allayed their concerns, the prospect should seem genuinely interested in investing in your success. Be wary of prospects who ask you "how much?" early in the process because they often are looking for an easy way out: "Sorry, too rich for my blood."
- Avoid making the ask on the phone or in writing. It is much more difficult to say no in person.

In our culture, talking about money is often taboo. But in fundraising, there is no way around it. One of the biggest mistakes a fundraiser can make is not asking for a specific amount. Below are the steps to making the ask:

- Look the prospect in the eye.
- Calmly and confidently ask for a **specific** amount or range (e.g., $50,000 or a range such as $50,000 to $75,000) so that the prospect can make a decision within a context.
- Do not say anything else until you have given the prospect time to respond.
- If the prospect says that they are interested but the amount you quoted is too high, ask them what they would be comfortable giving.
- If the prospect is not ready to make a firm commitment, ask for guidance as to when it might be appropriate for you to check back.

Tip: When a prospect says "no"

- Remember that it is not about you. A potential funder is saying "no" to your program/project/event—not to you as a person.
- If you receive a response in person or by phone, you may still receive a form letter. The letter is the official company response to your request.
- If a corporation that you would like to fund your coalition declines, keep the contact information on file. There may be an opportunity to approach it in the future.
- Look for opportunities to turn a "no" into a "yes." The key to a "no" follow-up conversation is to first indicate that you have heard the initial "no" and thank the company for considering your request before exploring other opportunities to work together. When a corporation declines to fund your program, it will usually provide an explanation (e.g., it has already made funding decisions for the year). Once you acknowledge the company's answer and thank it for considering your request, you can decide whether or not to gently probe the explanation.

Writing the Proposal

In today's competitive fundraising environment, it is important to develop a compelling funding proposal that effectively and concisely describes a problem in your community, your strategy and capability to address the problem, and how funds will be used if secured. A few key points to remember:

- *Be concise*. Your goal is to paint a compelling picture that engages and guides the grant reviewer through your proposal. Too frequently, grant writers feel the need to include everything they know about the general topic.
- *Avoid jargon and acronyms*. Assume that a prospective funder knows nothing about the issue or your CKF project.
- *Grantmakers receive far more requests than they can fund*. It is incumbent upon you to draw the parallels between your program and the grantmaker's funding priorities.
- *The proposal should be engaging and easy to read*. Use bullets and other formatting tools to highlight key points. If appropriate, use charts for data rather than long, wordy descriptions.
- *The tone should be confident, not desperate.*
- *Ensure that the nature of the proposal matches the budget and the request for funds*.
- *Employ a rigorous review process*. Ideally, a proposal should be reviewed by:
  ? A colleague who can ensure that it is an accurate depiction of the program and provide substantive feedback
  ? Someone not directly involved in the program who can ensure that it is clear and compelling
  ? A copy editor to prevent any grammatical errors and ensure clear, crisp writing

To help you develop your proposal, refer to the Elements of a Proposal section of this toolkit and the Proposal Checklist Worksheet, for tools and guidance on developing proposals.