Show Me the Green: Foundation Fundraising for Land Trusts

Outline

PRE-PROPOSAL

1. Know Mission, History, Accomplishments
2. Review past proposal examples: It's not plagiarizing
3. Locate standard attachments ahead
   a. If you're not asked for it, don't provide it
   b. IRS Letter
   c. Organizational budget
   d. Board list
   e. By-laws
   f. Articles of incorporation
   g. Most recent audit
4. Identify supporting media about your land trust

Research

5. FDO & Guidestar & Website
   a. FDO – general research
   b. Guidestar – 990s
   c. Foundation website – lots of good info
6. About FDO
   a. See Resources for how to use FDO
   b. Exclude grantmakers directions
   c. Geographics – Where you're located vs. where you provide benefits
7. Types of foundations
   a. Start with community foundations
   b. Family foundations
   c. Corporate foundations – banks, local businesses – problem being tied to them?
   d. Regional/National foundations – not competitive
8. Guidestar
   a. Reading a 990
      i. Part I: Basic info about the foundation and mission
      ii. Part 4: Grants and expenses
      iii. Part 5: Net assets – do they have sufficient assets to make decent grants
      iv. Schedule I, Part 6 of Form 990: who and how much
9. Wheel of Giving: remember, we're not competing with each other
10. Fit the foundation to the project, not the other way around
11. Identify one or more prospects
12. Do First: Review RFP: print/highlight
   a. Deadlines, including award
   b. Timeline – set up for yourself

      c. Questions: Foundation priorities like EJ

      d. What standard docs are required?

      e. Determine a feasible award amount based on past giving

13. Know the Project
    a. What's the problem?
    b. How the project will fix the problem
    c. Evidence of need – use facts AND stories
    d. Know how project ties to Strategic Plan
    e. Consider partners
    f. Who is the audience for the project?
    g. Know the DEI implications (EJ resources)
    h. Measurement/Evaluation
    i. Sustainability (how you will fund after the award)

14. DEI – QUESTION: Why does it matter? Ethical/Practical; See Resources

15. Data Haven – Data/Communities – Foundations

THE PROPOSAL

16. Money Drives the Bus: Start with a project budget, including revenue
    a. Categories: Supplies, Signage, Printing

17. Budget Example – Review – Land trust contribution is important
    i. Can be Funds, Inkind

18. What is IN-KIND? Volunteer time

19. How do you determine Volunteer value?

20. More Budget Stuff
    a. Match if needed
    b. Budget narrative if needed

Writing the Proposal

21. Narrative Basics
    a. Spell check
    b. Proofread
    c. Vary sentence length
    d. Hook (Project name)
    e. If they don't ask it, don't answer it
    f. Cite applicable resources
    g. If you can include photos, do

22. Outcomes vs. Activities
    a. Overall view of good in the world that will happen
    b. Activities (how you will make the good happen)

23. Measurement: examples
    a. Number of acres protected

      b.   Number of species of special concern protected

      c.   Number of people with increased knowledge

      d.   Number of plants installed

      e.   Gallons of stormwater infiltrated in a year

24. Key Personnel: Pics if possible: What do people respond to? FACES

25. Conclusion: Restate the ask

26. Lastly

      a.   Project Summary – do this last

      b.   Cover Letter if not online

27. Weird questions

      a.   What is your theory of change?

      b.   How did you determine the amount of your request?

      c.   How do your evaluation results determine your programs/operations?

      d.   How will you ensure accountability?

28. Draw attention to Resources: Grants Matrix: if doing more than one grant at a time

POST GRANT FOLLOW UP

29. Know when the award is anticipated, follow up

30. If declined, understand why to better inform future

31. If awarded, acknowledge

      a.   IRS requires nonprofits provide acknowledgment letter to donors of $250+ for tax purposes.

      b.   No goods or services

32. Good internal practices – share out award, timetable, deliverables internally

33. Document activities/outcomes for report (see example):
    https://www.pathwaystogrowth.us/seven-tips-for-writing-an-exceptional-grant-report