



Foundation Relations: Trials, Trends and Tribulations

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*Never substitute vision for rigor,
intention for action,
or conviction for evidence*

-Venture Philanthropy Partners, 2006

The Hidden Questions

- Why is your org *ideally* suited to provide the service or intervention it does?
- Why is it important to fund this initiative at this time?
- What makes your leadership outstanding?
- What mistakes have informed your growth?
- What will happen in the community if this initiative isn't funded?

The Hidden Questions

- How does this proposal fit into the organization's larger development or programming goals?
- How is this program/service timely or relevant to current issues in our community?
- How did an existing body of knowledge inform or shape programming or rationale?

Top 10 mistakes

10. *“Site” visit is a misnomer*

Top 10 mistakes

9. *Blood in the streets*

Top 10 mistakes

- 8. A budget should answer more questions than it provokes*

Simple Budget 1-year Project

PROJECT BUDGET - Helping Others Organization		
BUDGET LINE ITEM	BUDGET PERIOD JULY 1- JUNE 30, 2008	
FUNDING SOURCE	EGFF	OTHER SOURCES
PERSONNEL (Salary and benefits) .8 FTE Project Mgr; .2 FTE Project Assist	\$12,500	\$19,000
INDIRECT COSTS (10%)	\$1,250	\$1,900
RENT ASSISTANCE VOUCHERS	\$25,000	\$15,000
SUPPLIES	\$1,000	\$1,000
TRAVEL xxx miles/mo. at Federal Rate	\$500	\$500
OCCUPANCY	in-kind	in-kind
TOTAL PROJECT COSTS PER YEAR	\$77,650	
TOTAL EGFF SUPPORT PER YEAR	\$40,250	

Multi-Year Budget

PROJECT BUDGET - Helping Others Organization						
Project duration: July 1, 2008 through June 30, 2011	Year one		Year two		Year three	
Budget Line Item	EGFF	OTHER	EGFF	OTHER	EGFF	OTHER
PERSONNEL (Salary, benefits) .8 FTE Proj Mgr; .2 FTE Proj Assist	\$12,500	\$19,000	\$10,500	\$23,000	\$8,500	\$25,800
INDIRECT COSTS (10%)	\$1,250	\$1,900	\$1,050	\$2,300	\$850	\$2,580
RENT ASSISTANCE VOUCHERS	\$25,000	\$15,000	\$15,000	\$25,000	\$10,000	\$30,000
SUPPLIES	\$1,000	\$1,000	\$0.00	\$500	\$0	\$500
TRAVEL xx miles/mo. Fed. Rate	\$500	\$500	\$500	\$500		\$1,000
OCCUPANCY	in-kind		in-kind		in-kind	
Project costs per year	\$77,650		\$78,350		\$79,230	
EGFF support per year	\$40,250		\$27,050		\$19,350	
TOTAL PROJECT COSTS \$235,230						
TOTAL EGFF SUPPORT \$86,650 (37%)						

Top 10 mistakes

7. *HOW MUCH?*
(is that a type-o?!)

Top 10 mistakes

- 6. Trying to pry open a floodgate will leave you high and dry*

Top 10 mistakes

- 5. Some people have a way with words
Some people no have way*

(Steve Martin)

Huh?

“CCCCHS is the leader in ECE services in our county. As a recipient of CDBG funding, our project will be managed through the Clackamas County CDD”

Top 10 mistakes

4. *Fail to plan = plan to fail*

Sample Project Planner

Project Task	Action Required	Resource Needed	Target Date	Identified Barrier or Challenge	Expected Outcomes
1.					
2.					
3.					
4.					

Sample Project Planner

Project Task	Action Required	Resource Needed	Target Date	Identified Barrier or Challenge	Expected Outcomes
Complete a Feasibility study	Draft and dist. RFP Identify prospects Create strategy	Board com. Dev. Director Dev. Dir,Chair	7-15-08 8-31-08 9-15-08	Lack construct. experience Donor schedules	<ol style="list-style-type: none"> 1. Validate the case statement 2. Reveal sources of likely support 3. Assure success in public campaign

Top 10 mistakes

3. *A shotgun wedding will not bring love*

Top 10 mistakes

- 2. Your mother was wrong: it IS nice to brag (if it's true and it gets you funded)*

Top 10 mistakes

1. *Assumed virtue is dead.
Proven interventions live on.*

Final Thoughts

- Request letters of support first-draft them if possible
- Read instructions before you start and before you send
- Check your math and formulas on the budget
- Spell check your narrative
- Double check the font, page limit and format restrictions before sending
- Run or request financial reports well ahead of schedule-and double check them
- Recruit a second reader
- Clarify if the due date is postmark or received-by
- Know your express pick up times



I welcome your comments and questions

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