

# The Path Forward

## For New & Growing Non-Profit Organizations



November 2007

The American Institute of Philanthropy (AIP-located on the web at [www.charitywatch.org](http://www.charitywatch.org)) is a very helpful resource for nonprofit organizations. Its main goal is to help donors to make the best choices when giving to nonprofit organizations. By evaluating the finances—like what percentage of a donation actually gets to the cause for which it was solicited—this organization grades charities and publishes the results. The site contains helpful articles and links too.

AIP recommends several things that nonprofit boards can do to protect the donors and at the same time strengthen the organization in a 2003 article *Are Charity Boards Asleep At The Wheel?-Nonprofit Governance Problems*.

These tips include:

- The board should include at least 5 independent members who are not related to any other board members, are volunteers, and do not have business or other interests that might conflict with their impartiality making decisions for the organization
- The board should include one member who is an accountant or financial professional to make sure there are regular audits, good internal controls, ethical accounting practices, and full disclosure to both donors and the board.
- There should be a formal board policy regarding conflict of interest and a code of ethics.
- The board should have the power to hire, fire and set the pay for the executive director and other key staff members
- There should be an open line of communication between the staff members and the members of the board
- The board should approve all contractual fundraising arrangements

Is it time for your organization to hold a board retreat? Ask me to help you plan and facilitate this event so that everyone grows and has fun while the organization is strengthened.

### Donor Giving Season

Connecting with and building your base of individual donors is extremely important especially during the holidays. Guide Star surveyed American nonprofit organizations and reported (11/7/07) that 45% of them receive the majority of their donations during October, November, and December. This is known as the "Giving Season." Mel Warwick's newsletter (11/2/07) reported that donations from individuals account for more than 75% of the revenues for nonprofit organizations. When bequests from deceased donors are added, the number rises to 80%. The Donor Power Blog (11/1/07) indicated that people over the age of 50 will use the internet to donate to a nonprofit organization once they have responded to a more personal direct solicitation. To take advantage of the Donor Giving Season, here are some things that I can help you to do:

- Send a personal signed holiday card
- Send a practical and useful thank you gift like a refrigerator magnet, pen, or a calendar which includes your contact information
- Offer a way for donations to be "given" in the name of others as Christmas or Hanukkah gifts
- Create a "catalog" of specific giving opportunities that can be purchased
- Send a letter that appeals for gifts to benefit one specific cause or person by telling their compelling story and includes photographs
- Make a strategic plan to communicate with your donors directly at least four times during 2008
- Make your December newsletter festive and memorable
- Plan a holiday open house or event (FOR NEXT YEAR)
- Don't forget to say Thank You!

Call me for all your writing needs. I promise to put your heart on paper so that others will be drawn to your side.

### Getting Ready To Receive A Grant

Just needing money is not a good enough reason to apply for a grant. Foundations and Corporate Giving Programs receive hundreds of requests every week. They are not waiting for someone to ask for money. Instead, their boards set giving priorities which they use to evaluate requests. Sometimes the criteria include "hoops" and deadlines that don't make sense to the nonprofits which hope to become funded but which serve to sort them. Many funders' boards meet in April or June but require requests to be submitted by February or March for consideration. It is vital to find out about and follow the criteria set by any funder if your organization hopes to get a grant. I subscribe to and can search the Foundation Center's data base of grant funders for you but first I need to know what you want to fund. Funders also define the types of programs that they will consider and may even specify where their recipient organizational headquarters should be located. Once we identify several prospective funders, I can coach you through the process you need to follow to maximize the likelihood of being funded. The most effective grants have a relational connection between a member of the funder's board and someone in your organization through whom the initial contact can be made. This bypasses the general "gatekeepers" and gets your request closer to the board meeting. One of my client organizations had a relational connection to a grantor's board member who even volunteered to preview the proposal before we submitted it. Of course, I implemented all of his suggestions. Once you have an invitation to submit a proposal, I can make the language in your ask resonate with the funder's literature. I can also connect your program with research and with your track record and statistics that suggest your proposed program will work. Lastly, I can help you to design and facilitate the evaluations, reports, and follow-up communication requested by the funder. Don't wait! It takes several weeks to prepare winning grant requests.

**Don't forget to call me to write your end of year tax letters and holiday communications. The new grant giving cycle begins in January. Call me soon for help researching prospective funders and writing the proposals to receive grants.**

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