



## Oliver Tessier & Associates

Nonprofit Leadership Specialists

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# The Solicitation Process

## Seeking Funds from Major Donors

### Prospecting

Identify prospective funders, their interests, funding history, and alignment of their interests with your nonprofit's mission and programs.

Different funders have different interests, and their interests vary at different times. Research the giving trends of funders that you know by talking with your strongest personal contacts with the funder. For unknown funders, you can often find information on the Internet or through the Foundation Center.

Ask funders who give you money about peer funders who might be interested in giving you money.

Find out what you can about the funders' proposal format requirements and their deadlines for submissions for applications or letters of intent. These deadlines typically vary from year to year, so development staff should check regular funders as well as new prospects.

### Cultivation

Develop relationships with funding sources that don't involve direct solicitations for gifts. These relationships often take time.

- Offer funders meaningful information about your work, inviting them to visit your organization when you have something compelling to engage their attention.
- Seek advice from funders who work in your area, inviting their input based on their experiences with related organizations in your field.

### Proposal Development

The most successful proposals start with the need that you are addressing. Work from your organization's mission, strategic plan, and/or operating plan, to identify the impact your program will have on needs in your community.

While the means by which you plan to achieve your goals are important, the ends are of primary interest to most funders: focus on *outcomes*, on how you are going to affect the lives of the people/communities you serve.

Good proposals include measurable outcomes and the means by which they will be measured. While performance indicators for the delivery of services can be difficult to codify, you must find something that tells you, and your donors how effective your services are.

Good proposals reflect realistic income and expense budgets.



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Good proposals reflect solid thinking about how your board governs and your organization functions. They are well-organized; they demonstrate that you have the resources to deliver what you promise; and

If the prospective funder has proposal guidelines, follow them. This may mean restructuring, condensing or expanding your basic proposal.

## Asking for Money

Consider these assumptions:

1. Many people and institutions want to give money to organizations that can make a difference in areas that interest them.
2. If you are invested enough in your organization to consider asking someone to support it, then you must believe its work is worthwhile.
3. If your organization is worthwhile, and it does work that a funder wants to support, then you are doing the prospective funder a favor by presenting a solid case for solving a meaningful problem.

You are asking for your nonprofit, not for yourself; therefore, ***ask with pride***. The confidence behind your request has the potential to put the prospective donor at ease so that s/he will be receptive to your story.

Start with a specific idea, but be prepared with more than one approach. If you discover, face to face, that you've not understood a prospective donor's interest, have another ready.

If you have received funding from the donor before, know when, how much, and for what. A modest reminder to the donor about how valuable his/her ongoing funding is to your nonprofit ties recognition of past gifts to your present request.

It's perfectly fair – particularly with foundation or corporate donors – to ask when decisions will be made about funding, when you might be notified, when checks might be forthcoming.

## Delivery

The most critical component of relationship cultivation depends on your performance and on your behavior toward funders throughout the funding process.

- Say "Thank you" immediately and personally. Board members are a great asset in this area.
- Keep the funder informed and engaged about your progress.
- Use the funding for what you claimed you'd use the funding. Your nonprofit is a beneficiary of the public trust. Failing to perform in accordance with promise may be illegal, and it has a high probability of being messy.
- If you foresee problems delivering what you've promised, negotiate with the funder early on, rather than deliver bad news when it's too late. Maintain appropriate levels of confidentiality, but tell the truth – without distortion.
- Meet reporting and solicitation deadlines. Always.



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## Rejection

You won't get everything you request. You won't always know why. Engaged, progressive funders will often give you a general indication of what to expect (if they know) when you make a request. If you get a rejection, call your most personal contact at the funder and ask to be educated. You want as much information as s/he can give you about why your request was rejected so that you can improve it next time. You also want to find out when you will be eligible to apply again.