

Part I

Laying the Groundwork

Chapter 1

Foster Internal Relationships

“Before you contact any foundation, make sure that your own house is in order. One thing that is important to us is that a Board of Directors is giving to its own organization. The nonprofit board today needs to be a fundraising board. If your board is not giving 100%, then why should we?”

Irene Phelps, President
Siragusa Foundation

Just like everything else, strategic grant seeking begins with a mindset. Organizations that consider foundation grants to be a staff function are limited to what the staff can achieve alone, whereas those that draw upon the expertise and connections of organizational leaders soar to new heights in grant seeking success. The moment the organizational mindset is expanded to consider funders as partners with the same goals, the significance of involving top leadership becomes apparent. When building collaborations in the field, nonprofits rely on leadership participation—in fact, as we will discuss in later chapters, partnerships within the community are so important that they are often included in strategic planning and outcome measurement. Once partnerships with funders are viewed in a similar light, the contribution of the board and senior staff begins to be truly appreciated and implemented.

Energizing Leaders

The connections and friendships of a board of directors at personal and professional levels can be extremely helpful in obtaining all types of funding, yet countless organizations have non-fundraising boards. Much has been written

about board members' responsibilities as fundraisers, and many books on how to prepare boards to ask for money are available today (1). However, many board members are never urged to fundraise by the staff of charities they are associated with. Consequently, board members of nonprofits often fail to fully understand their main purpose: to go out into the community and raise money or step down. Strong words? Not if you consider the board's responsibility as being equivalent to that of any staff member in the organization: in no circumstances would an agency tolerate a grant writer who did not write well, an accountant who mismanaged funds, or a case manager who abused children. But board members who put in an appearance solely at monthly meetings, or who make excuses when asked to assist in fundraising, are tolerated by their peers as well as by the organizational staff who is well-aware of the negative impact of such lack of engagement.

If a board member does not fully understand or accept this crucial role, putting it in writing as a job description or contract can be helpful. Organizations that expect board members to set goals for themselves and then continually evaluate individual members in areas such as meeting attendance, community activities, and giving find that the motivation and productivity of the board as a whole tends to increase. At The Gathering Place in Houston, TX, the responsibility of the board to fundraise is spelled out in the by-laws, providing board members with absolute clarity about expectations. As a result, approximately 40% of the organization's budget is raised through foundation grants. Going even further, Pitzer College in Claremont, CA, has implemented a "Trustee Report Card" to hold board members accountable to stated responsibilities including meeting attendance and total giving. The report cards are periodically reviewed by the Composition and Procedures Committee as part of the board re-election process; trustees who do not score well can be engaged in discussions and positive encouragement. As a result, the college has found that trustee involvement and motivation levels have increased tremendously (see Figure 1.1).

Nonprofit staff must realize that people typically serve on boards in the hopes of achieving some kind of gain; this may be personal (feeling important, gaining recognition amongst their peers), professional (fulfilling a job requirement, improving professional skills and expertise), or altruistic (contributing to a good cause, religious values). Therefore, in most cases board members want to work and be identified with each other—their peers. Instead of trying to involve each board member in isolation, a better method of encouraging fundraising and grant seeking may be bringing into play positive group dynamics that include other board members, such as committee involvement, peer ratings, and peer encouragement to name a few.

When it comes to grant seeking, nonprofits boards are typically even less involved than in other fundraising roles. A large majority of nonprofit leaders—including staff—think of foundation funders as individuals and institutions that support their programs based on the merits of a grant application.

Trustee Name	
Date	
Meetings	Number/percent of board meetings attended:
Gifts	Total cash contributions:
Pending	Pending pledge amounts:
Rating (1–5)	Category: Governance
	Attended all required meetings
	Reviewed any materials provided in advance materials of meetings
	Provided input to help the board make good decisions
	Served on at least one board committee
	Followed all by-laws and board policies
	Category: Contributions
	Contributed financially to the organization with personal resources
	Suggested other potential donors and board members
	Participated in all fundraising initiatives of the organization
	Facilitated connections with own affiliations and the organization
	Category: Volunteerism
	High level of communication and participation within the board
	Contributed expertise and knowledge to the organization and the board
	Represented the organization in at least one nonboard event in the community

Figure 1.1 *Sample Trustee Evaluation*

As a result, all contact with current and potential funders before, after, and during the grant seeking process is constrained by this accepted wisdom. Contrary to this type of thinking, foundations are now beginning to ask critical questions regarding applicant nonprofits’ board volunteer involvement and financial support and are unwilling to invest in organizations unable to show sufficient contributions by its own leadership. Further, as Chapter 6 explains, a large number of foundations rely heavily on the affiliations and priorities of individual trustees to award grants to nonprofits, and corporate contributions are based in a number of cases on employee recommendations. Hence, the role of the board in enhancing the grant seeking process becomes as important as its role in other areas of fundraising, although the methods employed may be different.

However, the reality is that many volunteer leaders would rather be associated with a special event or a building campaign, because it allows them to sell a “product” such as gala tickets or a named brick in the pavement. Sometimes directors are willing to invite their friends or business associates to the annual

Best Practice: ECHO

ECHO is a nonprofit Christian organization in North Fort Myers, FL, that networks with community leaders in developing countries to seek hunger solutions. Staff leaders aggressively pursue a board education and involvement policy; one method used to involve board members in raising financial resources is the creation of a Focus Committee on Development comprised of board members who are seasoned fundraisers, as well as those who are comparative novices. Committee members are provided with lists of donors to contact several times each month through personal phone calls. Their task is not only to personally thank the donors but also to gather more information about them, such as what motivated them to give, what opinions they have about ECHO, and whether they would like a tour or more information. The responses received and the opportunity to view the organization through the eyes of its donors has proved to be a wonderful experience for board members. Through a peer encouragement system, this committee has shown marvelous results in not only accomplishment of their tasks but in increasing board involvement and excitement about ECHO's work. In most cases, donors who were thanked and given an opportunity to express their opinions increased their giving substantially.

gala, but hesitate to approach the trustee of a family foundation to consider a grant proposal. Grant professionals at these organizations often express their frustration at the absence of board assistance and, in some cases, even present resistance to requests for input while submitting grant requests. Our study discovered that only 34% of respondent board members and senior staff were involved in grant solicitation activities such as utilizing personal contacts, writing letters of support, or making face-to-face presentations (see Figure 1.2).

Rather than play the blame game, grant professionals and senior staff should investigate the real reasons behind this lack of participation; every organization has a different set of circumstances, and board members cannot be energized until the whole picture is examined and solutions created. For example, a startup nonprofit may find that its board consists of overworked and uncaring individuals who were pressured into becoming board members without an explanation of responsibilities. Another organization may discover that one or more of its board members are dissatisfied with the way programs are being run but have never received the opportunity to express their feelings. A third organization's board may consist solely of professional experts—such as social workers or engineers—who contribute significantly to program policy but have absolutely no connections with foundations or corporations.

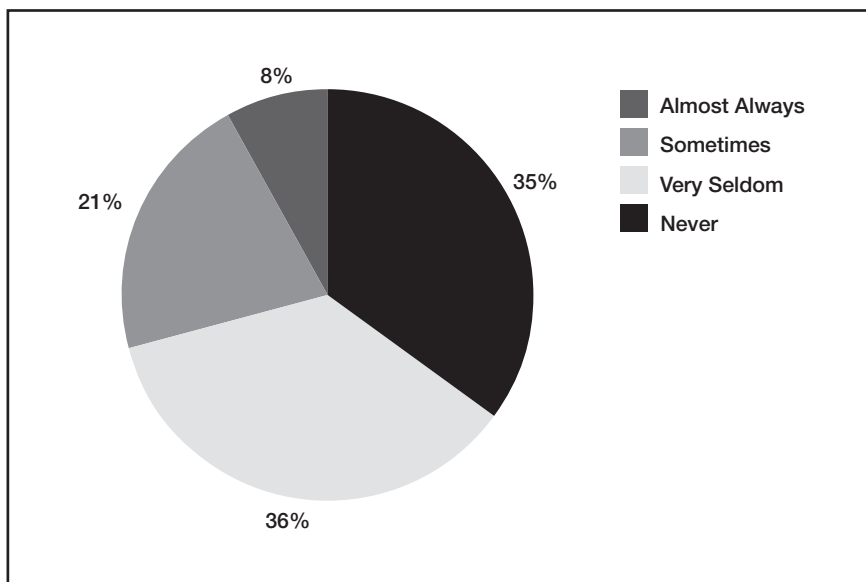


Figure 1.2 *Board & Senior Staff Involved in Grant Solicitation*

In many cases, however, lack of board involvement results from a simple unawareness of the importance of relationships in grant seeking; therefore, the first step in any type of board training or encouragement technique should be an explanation of why and how each board member can leverage his or her connections. For this reason, our research has immense value; grant professionals can use a number of methods—presentations, face-to-face conversations, or strategic planning sessions—to help the board comprehend its role in grant seeking. For instance, our research found that in the case of almost 55% of respondents, a quarter of grants in the last fiscal year were funded as a result of board relationships. Additionally, for more than 15% of respondents, half of all grants received could be attributed to board cultivation (see Figure 1.3).

Further, almost 36% of the organizations surveyed said they have never had a grant declined from a foundation where a board relationship existed. Chances are that the above data will have a powerfully energizing effect on board members as they realize the impact their personal friendships, business connections, and even neighborhood acquaintances can possibly have. It is also important to emphasize to the board, however, that relationship building is hard work and the presence of an affiliation alone is not sufficient to receive a grant. Our research also found that for just over half the respondents, 25% of grants were declined despite the presence of some kind of relationship. Therefore, board members working in conjunction with senior staff and grant professionals must

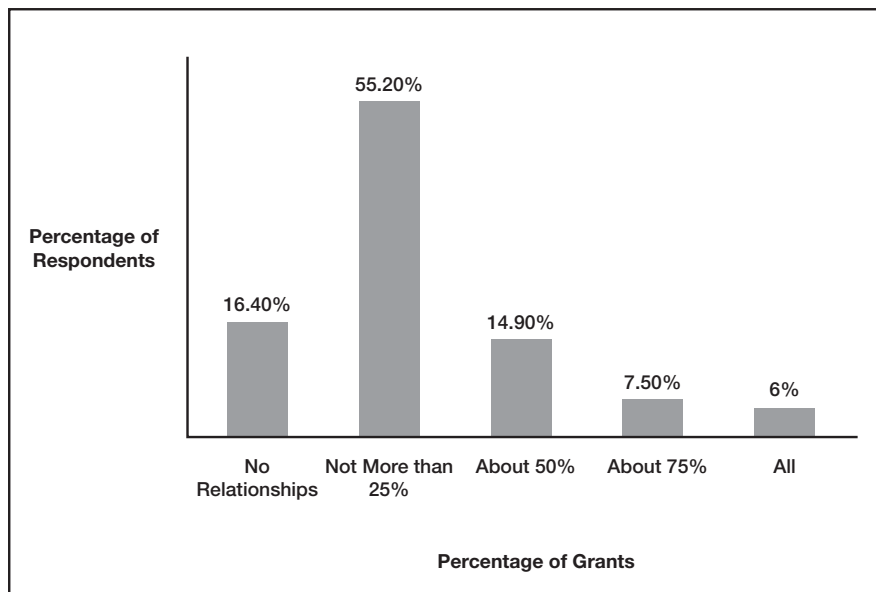


Figure 1.3 *Grants Funded Due to Board Relationships*

explore and cultivate relationships on an ongoing basis in order for the grant function to improve. Chapter 6 includes information about how some organizations are using creative new techniques such as mapping exercises to identify relationships. Although the grant professional in cooperation with fundraising directors must play a key role in this process, other areas of the development department—especially major gifts—can play an important task in training the board in cultivation techniques and how to make the ask.

It is equally important for board members to realize—and for nonprofit staff to help them understand—that relationship building can take many forms. The ideal situation for a nonprofit is to have one or more board members who are foundation trustees or who know such trustees personally. The average grant professional may wonder if that ever actually occurs. In fact, many board members of nonprofits large and small belong to or have personal connections with family foundations or donor-advised funds at community foundations. The people behind these foundations are not billionaires, nor do they necessarily come from historically wealthy families. Many ordinary individuals with a few million in assets have set up family foundations or donor-advised funds in order to have a greater impact and receive tax benefits. Since many do not accept unsolicited proposals, the key to accessing those funds is to connect with these people in a genuine way using current and new board connections. See Chapter 6 for a discussion on the various types of foundations.

Furthermore, organizations in the very early stages of development can sometimes bring in funders, social and community leaders, and corporate officials with relative ease. Having the backing of well-connected individuals who believe in the mission of the organization from the very beginning is the best way to avoid discussions of board responsibilities in the future. Similarly, organizations starting a new project or program can also include funders and community leaders during the planning stages, thereby increasing their chances of continued success. For example, the trustees of smaller family foundations are often personally involved with nonprofits; attempting to build relationships with such people and encouraging their involvement either as board members, advisors, or program volunteers can be very helpful as well. This concept is explained in several chapters later in the book.

One challenge faced by many nonprofit boards is their lack of involvement with programs. In many cases, the extent of a board member's understanding of what occurs in the organization on a daily basis is limited to monthly or quarterly board meetings, updates by the executive director, or information in newsletters. Sometimes senior staff is partly to blame for this arm's length approach, but frequently board members themselves dictate the level of involvement. Consider this: someone who learns about a closing sale at a local furniture store will gladly spread the news to everyone they know, but rarely will they discuss a new retirement plan. The reason: the first is easier to explain and more exciting to share, while the second is complicated and not easily understood. If only the workings of the plan could be explained in plain English and the benefits and rewards clarified, he or she would be thrilled about sharing this good fortune with others. Board members may find themselves in a similar situation and, consequently, be hesitant to involve their friends or colleagues in an organization they themselves are not excited about.

In some cases, board members who *are* engaged may feel exhausted by the continual stream of fundraising activities they already participate in—after all, they have their own professions, families, and other responsibilities to deal with as well. Grant professionals must be understanding of this dilemma faced by many well-meaning board members and try to facilitate the grant seeking process for them as much as possible. If fundraising saturation has occurred, creative ways of remotivation must be considered: for an organization conducting one or more fundraising activities that include board involvement—such as a capital campaign or a special event—it is possible to translate the same excitement into grant seeking by keeping the momentum going after the conclusion of other campaigns. This can be accomplished by offering ongoing board training on fundraising, grant seeking, and on the organization's programs; a necessary component of this continued training is providing grant professionals and other development staff access to their leadership through informal meetings or by encouraging staff to attend certain board meetings.

Best Practice: JEVS Human Services

JEVS Human Services in Philadelphia, PA, enhances the employability and self-sufficiency of individuals through a broad range of support programs including job readiness, skill development, and vocational rehabilitation. JEVS has a \$72 million budget supported primarily through government sources and service fees; individuals and foundations are approached to fund the gaps. As a result, the organization often finds it difficult to motivate board members and make them understand the need for foundation dollars. In order to empower and educate the board, the development staff at JEVS designed short funding profiles for each program that needs funding; the profiles are summaries of larger proposals, clearly and succinctly explaining the programs, target audience, budget, need, and funding gaps. The profiles are collected in loose-leaf binders separated by area of focus; each funding profile is a stand-alone document that can be detached by the board member for his or her use. With the introduction of these funding profiles, the board has become empowered to explain the programs and their needs to potential funders in a way that was not possible before. They find it easier to get a true understanding of the what, why, where, how, and who of the organization's more than 20 different programs and are therefore motivated to assist in fundraising efforts.

Since many Executive Directors remain cautious of unrestricted board–staff interactions, procedures can be put in place to ensure continued success: for example, staff may be requested to inform the Executive Director beforehand of any meetings with board members and to report back with notes or minutes. Additionally, program and development staff may be required to deliver presentations about their areas of responsibility at board meetings. Thirdly, annual meetings may include informal discussions, meet-and-greets, and other avenues for staff to interact with board members without the typical stress of work or deadlines. This type of guided communication allows, among other things, the sharing of knowledge about prospective grantors as well as individual donors who may have foundation connections, and expand the use of moves management (2) from major gifts and annual campaigns to foundation relations.

Introducing Fresh Faces

If all efforts to identify and utilize connections fail, an organization must realize that the current board setup may not be advantageous from

a fundraising perspective. As mentioned earlier, some organizations—typically startups or those located in remote rural areas—have few or no relationships with foundations. In other cases, many nonprofits fail because of a lack of good candidates or a higher priority on programs recruiting board members based on their corporate relationships, or personal connections with community leaders and funders. Our study asked respondents if their boards had good relationships with foundations through personal friendships, family ties, or professional dealings: the results showed that although a large number of did have such connections, most did not (see Figure 1.4).

Contrary to popular opinion, this absence of relationships has nothing to do with the size or age of the organization. Our research found that while many *small budget* organizations had no relationships with foundations at the board level, a higher percentage of *very large budget* organizations also lacked these relationships (24% for small nonprofits versus 41% for very large ones). *Large budget* organizations came in a close second with more than 22% having no board connections (see Figure 1.5).

The effect of the above data is that almost 72% of all organizations without significant relationships received less than a quarter of their funding from foundations. Therefore, it should be recognized that although revitalizing and engaging board members is extremely important, a continual search for connected and eager individuals is just as essential in reviving a jaded board. The Minnesota Council of Nonprofits, like many others, highlights job

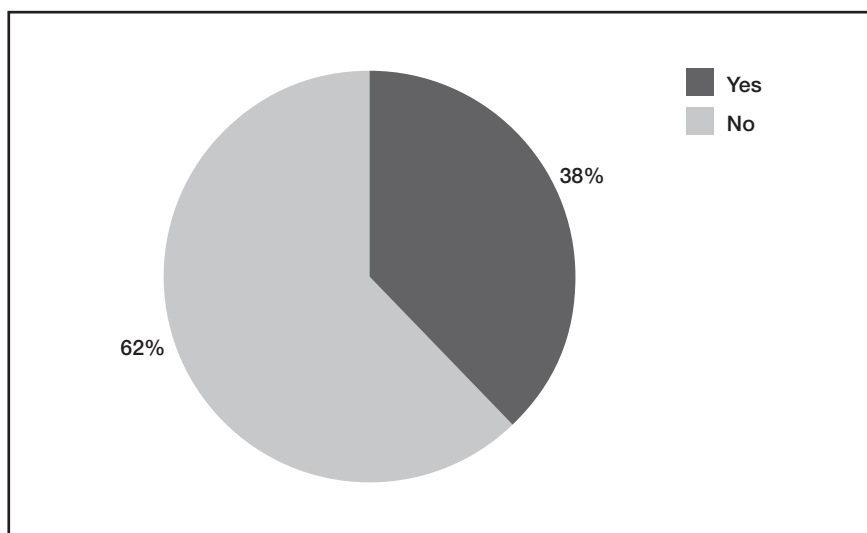


Figure 1.4 *Presence of Board Relationships with Foundations*

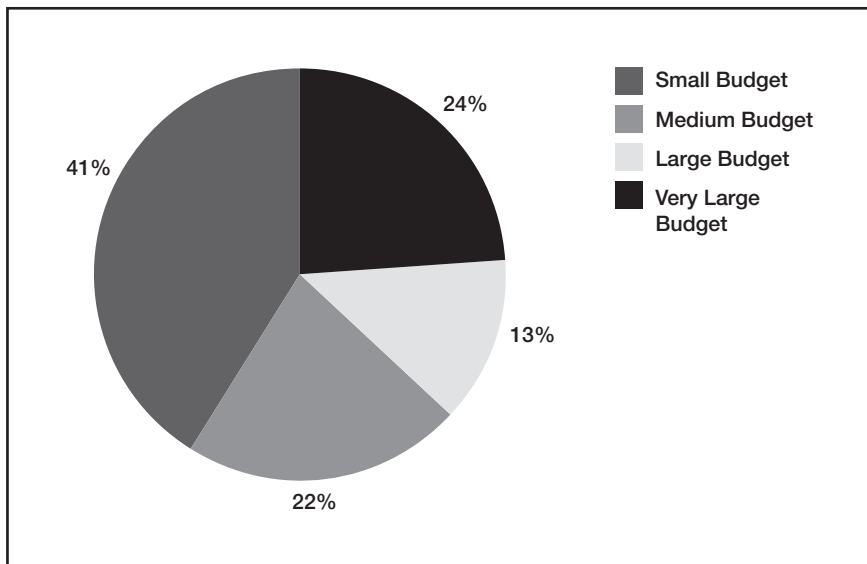


Figure 1.5 *Respondents Having No Board Relationships by Size*

descriptions of key leadership positions as well as personal characteristics to consider when choosing board members (3). Such resources can be helpful to organizations willing to bring in fresh blood and new perspectives. However, many nonprofits argue that finding and retaining good board members is like swimming against the current: it requires intense effort with very little chance of success. Although the quality of the board member can certainly not be guaranteed, numerous avenues exist for identifying high quality candidates:

1. Board Match programs sponsored by local United Ways and volunteer centers throughout the country; for example, the Center for Nonprofit Effectiveness in Miami offers frequent Meet & Greet receptions to introduce nonprofits to business leaders and community volunteers interested in serving as board members.
2. An organization's external stakeholders, such as community partners, bankers, and insurance agents who may have emerging leaders on staff.
3. Local business groups, such as chambers of commerce or networking associations of young lawyers or medical professionals.
4. Previous clients or others who have been positively impacted by the organization.
5. Foundation staff with whom relations are already strong enough to take to the next level of involvement.

Deciding who to invite to serve on the board is an important strategic decision for an organization; how it operates, how the outside community views it, and what its future holds depends greatly on the quality of the board members it attracts. If grant professionals are involved in this strategic decision-making process, they may be able to help find volunteers of the highest caliber based on their knowledge of funders—both foundation and corporate. For example, an adult literacy organization may benefit a great deal from inviting an employee of Dollar General to sit on its board because of the high priority placed by that company on that particular cause and the large amount of financial support it gives each year to similar organizations. Many times, the skills or expertise of an individual board member—say an accounting executive or a small business owner—may not have the same impact in terms of future grant awards as an employee of a larger company who at first glance does not seem to “fit.” In many nonprofits, only the grant professional has access to such information—another reason why open communications between departments as well as with leaders is important for organizational well-being.

Recognizing that volunteers, other than board members, can also be a source of wealth and connections, organizations should bring in new people through a variety of volunteer opportunities. Some volunteers may show potential but their lack of experience may preclude them from joining a board of directors; such professionals can be invited to join an advisory committee or a young leaders circle instead. Although it takes time and effort to polish these individuals and teach them the ins and outs of the organization, they can ultimately form a well-qualified pool of board candidates. While they gain experience they can utilize their employment or social groups to raise money by organizing special events or annual gifts.

A classic example of this type of leadership development program is Big Brothers Big Sisters of Metro Atlanta, GA, which utilizes a guild of young professionals called the “BBBS Ambassadors” to hold fundraisers and build community relationships. The annual fundraiser held by this group is aptly titled “The Big Event.” Many similar groups exist across the country with the aim of advancing the parent agency’s agenda—both program-wise and through fundraising—and offering networking opportunities among themselves. The Buffalo Bayou Partnership in Houston, TX, has the “Bayou Buddies,” a membership-based affiliate with its own steering committee and quarterly newsletters. It brings “like-minded green enthusiasts” together for volunteer events as well as social gatherings.

Although guilds and young professional societies are old friends of the fundraising department, grant professionals often do not consider them important to grant seeking success. Consider the model suggested by this book: that grant seeking is a critical element of the overall development plan

and must work in conjunction with other development areas as well as other organizational departments in order to be successful. Ideas and techniques traditionally used by other fundraising areas can easily be adapted by grant professionals or at least be used as a way to improve revenue from grants in the long run. Therefore, guild or advisory members who attend happy hours or clean up beaches may be up-and-coming professionals with potential in their companies, and may have connections with foundations at the family and corporate level. Granted, these connections may not currently be strong enough to bring in large dollar amounts, but the groundwork laid now will reap rewards in the future when a committee member advances to the trustee level in his or her family foundation or a promotion results in a position on the charitable contributions committee. It is important to be very selective and strategic in choosing members of advisory committees and guilds, and it is certainly permissible to inform prospective members about expectations of current and future support.

Advisory boards may also be created for the opposite reason: involving respected community leaders who have resources and connections but not the desire to serve on a board and take on added responsibility. Teen Lifeline in Phoenix, AZ, has created an Advisory Council consisting of a few high-profile individuals—such as the mayor, local television personalities, and high profile business men—who are willing to open their checkbooks or make phone calls on behalf of the organization. One new member is selected each year through presentation of the Community Lifeline Award, and award recipients commit to serving on the Advisory Council. For Teen Lifeline, which has an operating budget of less than \$500,000, the support provided by this high-powered group of individuals is critical.

Grant professionals must also remember that foundation trustees and community leaders are not the only source of grant funds; in fact, corporate volunteers are often an underutilized resource in grant seeking. A recent study of 36 Excellent Employee Volunteer Programs (EVPs) by the Points of Light Foundation discovered that 56% of Excellent EVPs provide release time to their employees for volunteering, and 58% offer grants to the organizations where employees volunteer. Further, 67% have formal award programs honoring employee volunteering that involve grants to nonprofits selected by the honorees. Not surprisingly, almost every corporate foundation or charitable giving arm of a company prefers to give to nonprofits where their employees are involved, yet nonprofits sometimes are not aware of the companies represented by their volunteer base or the grant opportunities available through these individuals. Organizations that understand the significance of corporate volunteerism often possess too narrow a perspective and focus their energies solely on board member affiliations. However, some non-board volunteers are often more committed to the organizations they serve because they perform

their duties without the prestige of a label. This commitment can be leveraged into dollars if the time and effort is taken to get to know them and their employers. Many nonprofits have corporate involvement events—such as “Bowl for Kids’ Sake” events by many Big Brothers Big Sisters affiliates spanning weeks or even months—but few take advantage of the excitement generated by these events to attract and retain high-quality volunteers for ongoing grant seeking activities.

The above issue compels communication between programs and grant writing staff, because of the need to track volunteer hours and corporate affiliations. Systems, whether based on technology or paper, must be put into place so that the grants team is alerted of new volunteers as well as changes in current volunteer employers and positions.

For the sake of simplicity, take the example of Mr. Smith and Ms. Doe, both of whom have mentored clients in a job training program every weekend for the last six months. Mr. Smith previously worked at ABC Corporation, which does not match volunteer hours nor give grants to nonprofits. But, last month he got a job at XYZ Inc. as an associate. XYZ Inc. is well-known in the nonprofit community for its matching grants program, in-kind donation program, and cash grants program. Ms. Doe has already been working at XYZ Inc. as a Department Head for the last 15 years.

Needless to say, both Mr. Smith and Ms. Doe can be assets to the organization where they volunteer because of their professional affiliations—but only if the grant professional is aware of several things:

1. Mr. Smith’s job change from ABC Corporation to XYZ Inc.
2. Mr. Smith’s new position and the fact that as a new employee in a junior level he cannot seek grant funds, but can support a request for donated computers.
3. Ms. Doe’s senior level position, which could result in an invitation to sit on the nonprofit’s board or advisory committee, chair its gala, or write a letter of support for a major grant application.
4. XYZ Inc.’s policies for charitable contributions and volunteerism.

It seems simple enough, yet how many times do grant writers—or even program staff—track when a volunteer changes his or her job? Unless the volunteer happens to be a board member, chances are that this valuable information will never reach the organization. All organizations should have some means of recording employer information for their volunteers and updating it on a regular basis. This could be through quarterly surveys tied to volunteer recognition, reminders in monthly e-newsletters, or through one additional question asked by a case worker checking up on her case load. Further, volunteer orientation or regular training could be used to ensure that volunteers agency-wide understand the importance of tracking volunteer

hours, reporting to their employers and informing the nonprofits they serve of any internal decisions that could help potential grant applications. Lastly, only if cooperation and communication exists between the development and program staff will such information when presented be compiled and forwarded to the grants team; it is essential, therefore, that discussion about the implementation and tracking of such data should form a regular part of organizational practices.

Motivating Staff

A third source of relationships often not understood or considered relevant is nonprofit staff. Some organizations are fortunate enough to have senior management such as an Executive Director or CEO with connections in the funding community; these may be a result of prior affiliations or through active efforts at socializing and networking as part of their job description. Unfortunately, countless Executive Directors focus exclusively on programs and day-to-day operations—due to either a lack of resources to hire additional staff, or because of Founder’s Syndrome (5)—and may be leaving many relationship building opportunities on the table. The absence of staff connections, our research found, is quite prevalent (see Figure 1.6):

- 33% of *small budget* organizations possessed no senior staff relationships.
- 42% of *very large budget* organizations had no such relationships.
- 72% of respondents without staff connections with funders said they received less than a quarter of their income from foundations.

Another interesting fact uncovered by the research was this: nonprofits that had board connections had almost double the senior staff relations with funders (81%) as compared to nonprofits without board connections (42%). This finding may hold the key to the impact of senior staff relationships on the entire organization: board relationships may be more important in terms of money raised, but senior staff must pave the way and set an example by becoming involved in this process first. Only then will they have the desire and means to transform their leadership. Very rarely do nonprofits emerge into existence with high-powered boards, yet executive directors or CEOs can begin fostering relationships within their communities and with potential funders almost from day one. In some instances, however, the reverse also holds true: active board members can either persuade staff to become involved or to leave the organization, paving the way for more motivated personnel to enter. This should be food for thought for organizations that make excuses about the use of senior staff time only for program or administrative duties.

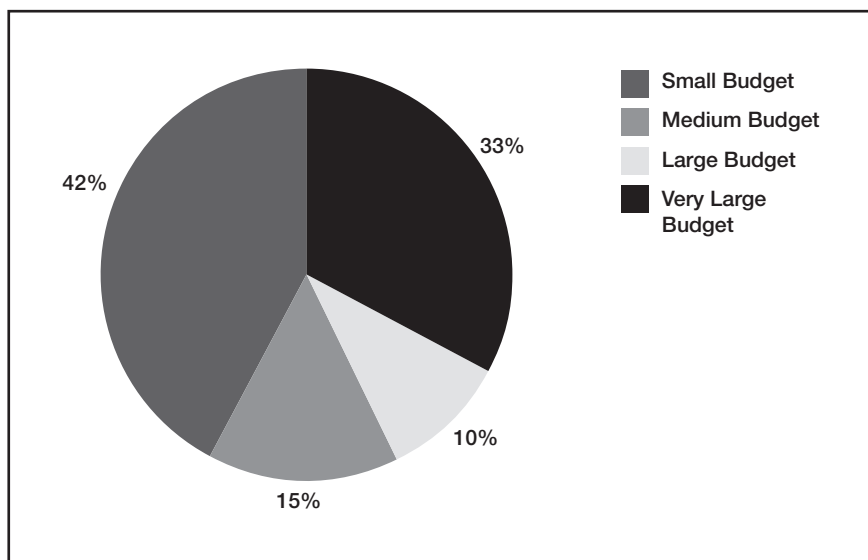


Figure 1.6 *Respondents Having No Senior Staff Relationships by Size*

Typically, the larger the organization, the more time the executive director or CEO spends on relationship-building, because more resources are available to hire lower level staff for programmatic or administrative duties. However, in these larger institutions, oftentimes other senior staff members such as program vice presidents or directors fail to take a similar approach, leaving relationship building and public relations efforts to the agency head and relevant departmental staff. This attitude is dangerous for many reasons: program heads may become micro-managers, or a serious disconnect may arise between an organization's public face and its internal functioning. As Chapter 2 will explain, building and improving an organization's community image is the responsibility of all staff, volunteers, and even clients. In the smallest of nonprofits, this approach is often adopted out of necessity, as every hand is expected to be on deck and pulling its own weight in bringing in new board members, donors, and volunteers.

The following chapters of this book will elaborate on some key issues touched upon here and how to move forward with the creation and establishment of grant seeking strategies for your organization. Bear in mind, however, that the elements discussed in this chapter—utilizing existing relationships with funders through three key types of people within your organization—should be addressed first before the factors in subsequent chapters can have the biggest impact.

ENDNOTES

- (1) See List of Suggested Resources.
- (2) A strategic and targeted set of actions and contacts designed to bring donors closer to a gift.
- (3) Minnesota Council of Nonprofits, Governance: Templates and Samples. www.mncn.org/info/template_gov.htm
- (4) Policies and Procedures of the Best Employee Volunteer Programs. Benchmarks of Excellence Series, Points of Light Foundation. www.pointsoflight.org
- (5) Founder's Syndrome is a pattern of negative or undesirable behavior by the founder(s) of an organization, after its initial growth when its mission evolves beyond what they originally had in mind.

Chapter 1 Checklist

Organizational Readiness

Indicator	Status
Are board members aware of our grant seeking activities?	
Do board members understand our programs and services?	
Is there an evaluation system such as job descriptions, contracts, or report cards for the board?	
Do board members give personal or professional referrals to foundations and corporations for grant seeking?	
Are new members invited to serve on the board on a regular basis?	
Do grant professionals and other staff members have contact with board members?	
Do we have a guild or advisory board to recruit and train potential board members?	
Are employees of our area’s large companies involved as volunteers of our organization?	
Does senior staff build and cultivate relationships with foundations on a regular basis?	
Do individual staff members have opportunities and time for networking and relationship building?	

Grant Professional Readiness

Indicator	Status
Am I aware of individual board members' personal and professional contacts with foundations and corporations?	
Do I have regular contact with the board's executive and/or fundraising committee?	
Am I involved in board education or training as it relates to the grant seeking process?	
Do I work with other development staff to create cultivation strategies that include foundations?	
Do I research community leaders and corporate volunteers who may serve on our board or guild and inform my leadership about these potential contacts?	
Do I work with program staff to monitor corporate volunteer involvement and changes?	