

# DRIVING PARTICIPATION

*with Beth Brodovsky*



## SESSION 030

### DP030 GRANTWRITING TO FUND YOUR MARKETING WITH MANDY PEARCE

**Beth:** Hello. this is Beth Brodovsky and welcome to Driving Participation. Today I have Mandy Pearce on. She is the owner of Fundraising For Good. We are going to have a really interesting conversation today about grantwriting to cover some of the things you may not think you could get covered from a grant. We talk a lot on this podcast about marketing and fundraising communications. What I hear from my clients and different people out there online, in person and when I go to conferences is “we would love to do a branding project or do a marketing project or get some graphic designs done professionally, but we can’t afford it”. Mandy is here today to tell us how you can use your grants, how you can find the right grants, write the right grants and utilize consultants to help you figure out what to do so you can get your communications projects covered through some grantwriting. Welcome Mandy!

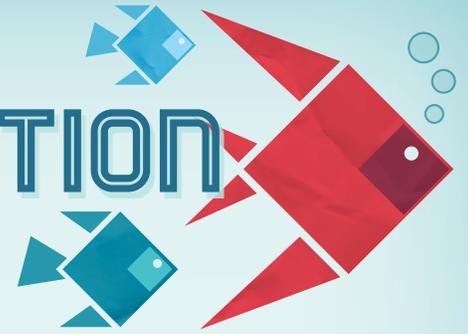
**Mandy:** Thank you. I’m so glad to be here.

**Beth:** Mandy, start off by telling us a little bit about yourself and how you wandered into this field.

**Mandy:** Okay, I initially got started, I volunteered a lot in high school. I was in the Girl Scouts forever. I worked with the American Heart Association. When I went to college, one of my part time jobs was working with the American Lung Association. One day the Executive Director came into my office and put a piece of paper on my desk and asked me to fill it out and send it off. I did not know what it was. I did not know the term ‘grant’ at that time. A few months later we got money and I was like “oh my gosh, all I did was fill out a piece of paper and we got money”. That was my very first experience with a grant. From then on I just loved getting free stuff. I was the person that did special event planning and I would get all the bag stuffers and get folks to come and participate for free and musicians. I’ve done lots of festival planning and that type of thing. As I worked with more nonprofits, I would write grants for them and the grants got bigger and more frequent. Over time I’ve written local, state and

# DRIVING PARTICIPATION

*with Beth Brodovsky*



federal grants. We have a very high success rate and there's been a lot of trial and error over the years. I've learned a lot from my mistakes. In 1999 when the economy crashed, I had a lot of folks coming to me asking for help finding grant funding because grants were becoming much more competitive so I offered a workshop. I said "there's so many people asking me, I'm just going to put something together and do it for the community" and that's how my business started. I had no idea it was going to be so successful. I had no idea there were so many people out there that needed the service. I started a consulting business and education business about four and a half years ago and it has just grown and grown and that's what I do all the time.

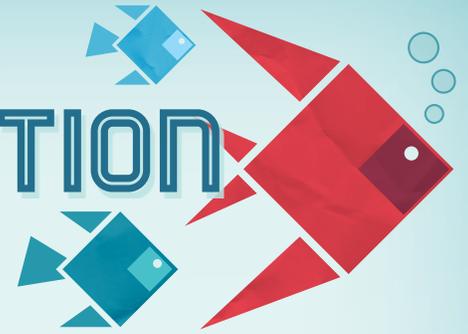
**Beth:** I have to say I'm not really surprised because I bet a lot of people and a lot of organizations are in the same situation that you were put into when you first started. Hey you're sitting here, you be the grantwriter. I think you're right. Probably when you started a number of years ago that might have been a little bit more viable, but as things are getting more and more competitive, is it getting harder for people that maybe don't know the tricks of the trade per se to be as successful as they want to be?

**Mandy:** Yes. What I find is that there are three basic types of folks. There are the folks in nonprofits who are grantwriters, who are development people who know what they're doing, but they're not having a high success rate so they kind of know what they need to tweak what they're doing a little. Then there's the folks who get sucked into it or the nonprofits who have had to down size and say "this is part of your responsibility now" and technically someone who has nothing to do with development is writing grants. They don't really know what they're doing and they're not being as successful. Then you have the folks who don't know it from Adam, who haven't had training, who haven't written a grant, who are brand new, but want to learn. Those are pretty much the three groups that I work with on a regular basis.

**Beth:** I bet there's a lot of them. Sometimes we get some feedback on the phone here. Let's talk a little bit about the thing I think is what's on most people's minds in the beginning is "where do I even start? How do I even find a grant?" How do organizations who know they want to get some money through a grant find the right people to fund things? I think for the purpose of this podcast we're going to talk about funding communications projects

# DRIVING PARTICIPATION

*with Beth Brodovsky*



because that's the focus of what we talk about here whether it's branding, whether it's getting somebody to help you with your ongoing newsletter or somebody to help you do - one of the other things we do is invitations or strategy. We do a lot of strategy communications projects, sometimes it's doing a new logo. When people need to do either creative graphical projects or a website, websites are a big thing that people want to do, that's usually well out of someone's budget. Is there a type of organization that people go to for that? Where do people look to get money to that thing?

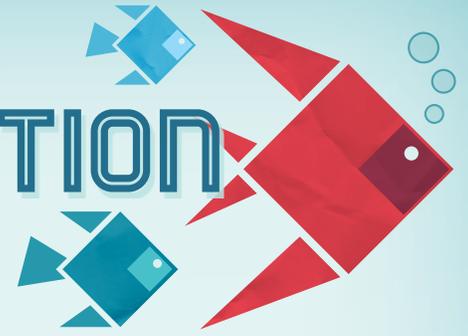
**Mandy:** Well, first thing that I tell folks is you don't need to start looking before you know what you need. The first thing that I always ask is "what are you looking for" and part of that is going to be "what are the dollar amounts" and part of that's going to be "what are the actual items". Sitting down and putting a list up, we need somebody to do templates for all of our social media for us. You have a header that looks the same and you have a brand. Some of that is going to be "do you need a website design or a website update or maybe you need to add something to your website like a bilingual page so you can serve multiple folks in your community". Maybe that's going to be someone coming in and updating a database. You really need to sit down and focus on "what do we need" and be specific about it. If you're going to say "we need web design", be more specific. Are you designing a new website or are you updating the one you have? If you're updating the one you have, what specific items are you wanting to do, add pages, add templates, add a blog page? What are the things you need in there? Do you need online registrations? Do you need 'donate now' buttons? What do you need? Until you know what those things are, you can't get quotes for them and if you can't get quotes for them, you can't figure out how much you're asking for a funder to give you. You need all of that information up front. Then you can go out and start doing research based on what your priorities are and what the funders priorities are. If they don't match, it's not a good fit and that's not the organization for you to apply with.

**Beth:** How do you find somebody whose priorities matches what you need?

**Mandy:** Part of that is going to be word play and creative writing. If you read on a foundation's website that they want to fund organizations that are in place, but need to grow or need capacity building, capacity building is a term that can mean increasing your

# DRIVING PARTICIPATION

*with Beth Brodovsky*



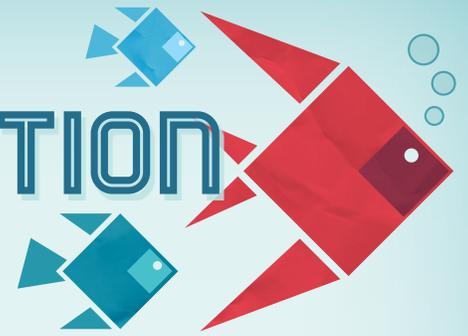
space, increasing your staff, increasing your resources in some way, but if you put down that you want to hire staff, they're going to look at that as overhead expense. That's not what they want to fund. It's all about how you phrase and explain to them what your needs are. I know you and I were talking earlier in the week and I was saying if you put down on a grant budget that you're going to want to spend \$1,000 on postage, technically that's the only thing you can spend the money on, but if you have money left over and you labeled that line item as a marketing expense, you could spend it on postage, envelopes, ink, toner, printer, design work or whatever because all of that is marketing. You can't send your marketing out if you don't have postage so that can be on the same line item, then it gives you a lot more freedom. Verbiage like hiring a consultant, if I was going to put down that I wanted you to be a staff member, I'm going to have to pay you employee taxes. I'm going to have to give you benefits. I'm going to have to do workman's comp and that stuff. Most funders do not want to fund salaries, but if I put down that we're going to hire a consultant, whether it's a technology consultant or a development consultant or whatever, people are much more likely to give you money for that because they know that folks need consultants to help them grow in lots of areas, but they don't want to have to pay a staff to do that because it's an ongoing expense and funders see that as something you are going to have to come back for again and again. Whereas marketing is more of a one time project, especially if it comes in the form of a consultant. Folks want to fund projects because there's two types of funding, program and project. Program is long term, project is short term. Projects have an end date and funders know if we help them with this project and we know what the actual results are going to be, they may not have to come back to us for funding in the future because that project will be completed.

**Beth:** Right. How do people balance the need to be broad enough to make sure they can spend the money how they need to when they get it with being specific enough to attract the funders attention and make them feel like "I know exactly what outcome is going to come out of us funding this project"?

**Mandy:** Almost all funders are going to want goals and objectives and those have to be measurable and timely and a lot of times people think that philanthropy is just everybody wants to do good, everybody's going to give us money. Well that's how philanthropy used

# DRIVING PARTICIPATION

*with Beth Brodovsky*

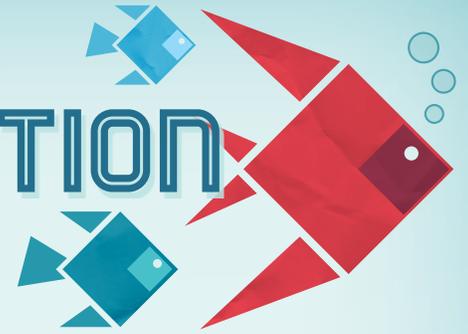


to be, but today they want to see a return on their investment. It's more like a banker. I'm not going to give you my money to invest until I kind of know what kind of return on my investments going to be and so they want you to say "this is what we're going to do and this is how we're going to do it and this is what we hope is going to be the outcome". You have to have some measuring tools. For example, I worked with an organization here locally that needed a website. They didn't have one at all and they needed their website to be bilingual because they served the Latino community. We went to a funder and explained to them the ability for us to be able to serve a larger community with that and how we could track it the way folks could write in to us from an elaborate computer because the transient community here is Latino and doesn't necessarily have computers. If they have a phone they can send us an email or check out times on line and it will be in their language so they know when to come so we can serve more people so folks aren't showing up at the door when we're closed. We had all of these really great things that we could measure and we told them we would track for a year, month to month, from month one to month twelve how many folks we were serving via the internet, via the office and how many folks were signing up for things online, how many people were sending in questions to us online and that sort of thing. It was trackable and you have to think in the funders mind "what will I do that will seem reputable to them and that will really be something that I can track". Don't make up stuff that's going to be like "I have no idea how I'm going to track that". With technology it should be pretty simple. If you're going to do branding, there's organizations here that have been around for twenty years and nobody knows who they are because they've either changed their logo five times or they don't do branding or they haven't been out in the community. You do branding for six months and then you send out a survey with survey money or whatever to constituents in the area and ask them questions. Do you know who this organization is? Do you know what they do? The responses you get from that can tell you if your branding is working. Are people recognizing who you are? There's a lot of ways and it depends on what your needs are through marketing, but you can definitely find ways to track that to tell the funder that their funds are being used successfully.

**Beth:** I think that's really key that you're giving people ideas to go after funding for projects that do have some measurables. It's probably harder to get money for things that are vague or general or when you're talking to a consultant or a designer or some a vendor to make

# DRIVING PARTICIPATION

*with Beth Brodovsky*



sure that you're getting an idea or planning a project that would have some measurables that would be meaningful to a potential funder.

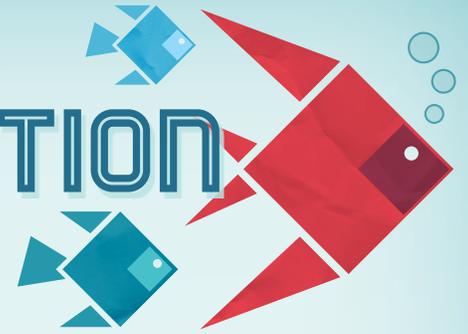
**Mandy:** As you go through talking with donors, let's say you have a capital campaign, you need to have marketing in place for your capital campaign before it takes off. You need to have newsletters. You need to have postcards. You need to have brochures. You need to have a website, a page. You need to have all that stuff. What happens if you don't? Well you need to talk to a consultant or a professional that can tell you this is the amount of success that we typically have from folks who have a marketing plan in place before the campaign kicks off. This is where folks are that don't. How much more successful are you going to be? What percentage of the overall ask is your marketing budget? This is where the planning ahead before you go looking for grants helps. If you have a ten million dollar capital campaign and you spend \$10,000 on marketing, that's nothing. If you don't know how much the campaign's going to be because you haven't done that research yet, then you can't really make that case to go find the funding from a foundation. If they know the ultimate goal is going to be raising ten million dollars and you're going to spend \$10,000 if they want that project to succeed they'll be more likely to help you fund it.

**Beth:** Is there a ratio that's standard that funders like? Is it like it can be 1% of what you're asking for? Is there anything specific or is everyone different?

**Mandy:** I would say for most local grants, things that are not federal government, the federal government hasn't said we're creating this in a formal program, then not necessarily. That will be something that you need to do as you build a relationship with the donor, which is the most important part of fundraising, building a relationship with the donor, but when you get into state and federal grants a lot of times, now I'm not just talking about marketing but in general, there is a dollar amount that they want to spend per person served. I've written a lot of federal grant applications and they don't want to spend more than like \$686 per kid. If you have a seven year program and it's \$1.2 million, then that's about 60-70 kids you're going to serve a year for \$686. If you sit down and you're like "this is how much we're asking for and it's going to be \$1,000 a kid", you know you're asking for too much. They usually give you some formulas in the guidelines for the grant applications when they say this is how much

# DRIVING PARTICIPATION

*with Beth Brodovsky*



we're willing to spend. Marketing, that's going to be different because you're probably not going to do...I don't know...you might do some marketing for state and federal grants, but it would probably just be programmed for brochures and maybe a web page. Again, read the guidelines, talk to the funder, build that relationship and ask them honestly "what do you think is realistic". If you're writing a grant for your organization as a whole and maybe you're putting in 3-4 different pieces and marketing is a portion of that, you're not going to have to focus on it as much. You're not going to have to break it up and say "this is what we're going to do, this is how much we're going to spend, this is who we're going to contract" because it's going to be mixed in with other requests.

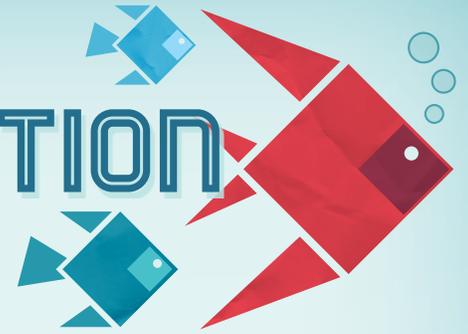
**Beth:** That makes a lot of sense to do something like that where you can mix it in and if you do need to do something like this to roll it in to another project so it doesn't have as much focus on it.

**Mandy:** Exactly. There are grants out there specifically for marketing, but they're not the majority. You are going to want to have them in the concept of a greater project. Now, there are going to be those occasions where your organization as a whole needs a website. That's what you need and we have sent out grant requests for that specific thing and gotten funded, but again small organization, small price tag. Larger organization, that's not going to be the only thing they need 99% of the time. You can go to more than one funder. You don't have to just rely on just one funder for that, which is great because maybe one funder will want to focus on a portion of the grant you've asked for and another will focus on another piece, but ultimately you get the whole thing funded. I can't tell you enough, it is key that you have to talk to the funders. You can't just say "it's an online application, I'm just going to go fill it out". No, unless it's a federal grant and you cannot build a relationship with the funder, you need to be emailing, picking up the phone and calling and writing them to see your program. Get them invested because that is what's going to compel them to convince their board that you're the project that they need to fund.

**Beth:** That's interesting. I didn't realize that funders would be interested in, much less willing to have conversations and talk to potential fundees in advance of getting an application in.

# DRIVING PARTICIPATION

*with Beth Brodovsky*

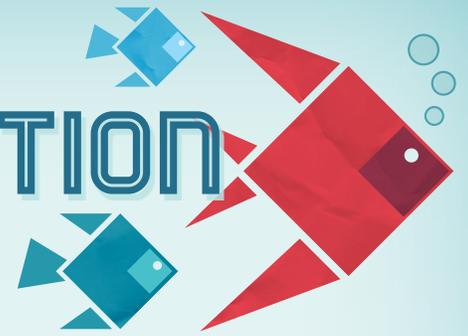


**Mandy:** The Program Officer's job is to learn, build a relationship with and be the voice of the nonprofit for the board. There's some foundations out there that only have one Program Officer and they're not going to have time to come visit every person that calls, but there's other places that have 20-30 Program Officers. That is their job. They have Program Officers for certain areas of things they fund and it is their job because if they know ahead of time when they talk to you that that's not the type of thing they fund, they're going to tell you that because they're not going to want to get an application from you and know that they're just not going to fund it. They don't want you to waste your time and so they advise people in that way. In addition, if they really like your project, they can tell you ways to tweak it to make it more appealing to the board, like "we're typically funded things on this genre in the past. We really aren't interesting in funding this and this is why. If you can make that fit into what our priorities are, you're much more likely to get funded". That's their job. They want to be able to fund people. That's why foundations exist. People are all like it's so competitive. They didn't fund us because they don't like us. That's not the way it works. It's their job to put the best applications in front of their boards so they really can make a difference in the areas that they have that passion for.

**Beth:** That makes so much sense because it's a lot of work, especially if you're a small nonprofit to put everything in place to get a grant together is a tremendous amount of work so to do that and not get it, I'm sure is just disheartening. Anything that you can do, I'm sure a lot of it is, 80% of the work is in the upfront research and planning. If you're a nonprofit that is contracting with someone like you that they're spending money in order to even apply for the grant. You want to be in a situation where you have the best, best chance of success. Is there a place where a nonprofit can look at and research the organization and see what did they fund last year, what size were their funds, what types of projects did they fund so that they can really look at it. Say they are doing a website and this is an organization that has funded website projects in the past, but they've given out smaller grants or larger grants, honestly if there's an organization that wants to fund \$100,000 projects and your project is a \$10,000 project, you still could not be in alignment with them, right? So where does someone go? Obviously calling them and asking them these questions, but are there other resources as well for people to find that out?

# DRIVING PARTICIPATION

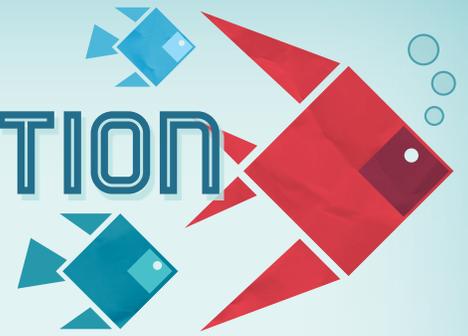
*with Beth Brodovsky*



**Mandy:** Absolutely and I will tell you that you need to do your research before you call them. Don't call them and ask them questions that are blatantly on their website. They're going to think "you haven't even done your research. After you do that, call me back". You need to read their foundation website if they have one and if they don't, take note, this is very important. You need to go look up their 990s. If you don't know what that is, it is the tax form that all nonprofits have to submit every year as well as private foundations have to submit. There's two types of 990s. There is a 990, which is for the nonprofit and then there is a 990PF, which is for private foundations. You can go to GuideStar.org and register for a free account and you can look up the 990s of any nonprofit or nonprofit foundation in the country. When you look up the 990, you want to scroll down immediately to page ten. For the private foundations, page ten will tell you several things. One) who the contact person is in the office, 2) if the contact address is an email address and phone number and website and if they accept unsolicited proposals. If they do, it will tell you the application process. It may say "see statement 13" or whatever and then you scroll down and find that. It may give you a copy of the application, it may tell you the website to go to or where to send a letter and what to include in that letter. So page ten of all 990s for nonprofits is very important. Then as you scroll to the bottom of the 990s for foundations, it will tell you the folks they funded last year, at what level they funded them and sometimes it will tell you what it was for. It's usually just something pretty general, like it might say general ops or salaries or whatever or it might say building renovations or roof replacement or whatever. Depending on the types of things they fund. It might be as generic as capital campaign. That will give you several things. One) it will tell you about the number of people that they fund. If there's five people listed, you're like "that's kind of competitive". It'll tell you the number of gifts they give out and what amounts. If they gave out 100 gifts last year and they ranged from \$500-\$365,000 that's a pretty good range. You look at are most of them in the twenties or in the thirties or are they literally all over the board. Then you need to go to their website and do all the research there. There should be grant guidelines, it should tell you their priority areas, it tells you why they exist, it tells you who to contact. Do all that information research first and then reach out and contact them if you feel at that point that they're a good match. they should tell you the area they are interested in funding. Is it Ohio? Is it Central Ohio? Is it Cincinnati, Ohio? Do they fund the south east or only this one little town in South Carolina? They'll tell you what they will fund. They should tell you what the application deadlines are if there are applications. You should

# DRIVING PARTICIPATION

*with Beth Brodovsky*



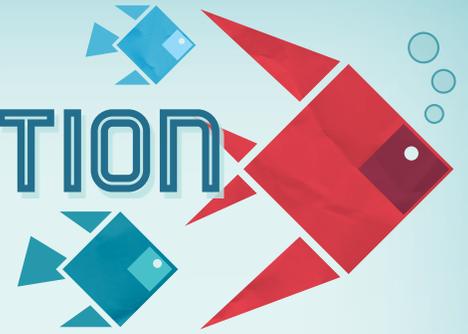
be able to contact the program officer, I have only ever seen one or two foundations that clearly state “do not call the office. If you have questions, email us” or “fill out the application and we’ll be back in touch with you in 3-6 months. Don’t contact us, we’ll contact you”. Most foundations are really open to chatting with you, especially if you’ve done your homework first.

**Beth:** So that’s another really good question. Another good thing to talk about because a lot of times people, at least in the experience I have in working with clients, they tend to think about things when they actually need things as opposed to “we’re going to need this eventually”. What’s the timeline or the cycle? Is there a specific time of year that people do grant review? Is it all different? From the time you submit your grant, how long does it take to have the grant approved and then the money to come? If somebody’s ready to do a project or has a need, a grant may or may not be the best resource for them to get the money. There’s always other options. Sometimes we’ve had people pay for the kind of work that we do by going after a major donor or somebody that’s been a very good friend of the organization and getting a specific bunch of money from that person that they can get immediately. If you’re going to fund communications through a grant, you don’t want to do it to promote your next event that you have to have the promotion done at this specific time. What’s the time line like?

**Mandy:** Well, the one thing that I’ll tell folks is that you need to start your grant research one year before you need the money in hand always because it will take you 6-9 months to get the dollars in hand. There are foundations that have quicker turn around times, like small family foundations locally may do some on a monthly basis. Some corporate foundations may give out money locally, like WalMart Foundation or whatever, but most of them 6-9 months. That means from the day you find it and start writing, to submission, to them reviewing it, their board deciding who’s getting funded, to you getting a check in hand. One thing to ask folks is “I see the deadline is March 5 and you will review these in April. Once your board makes a decision how long should it be before we have money in hand should we be selected for funding” and they can usually tell you “we typically mail those out the first week in May or the last week in April” so at least you have an idea if the grant money is going to come in time for the project that you need. Another thing is, you’re going to want to find more than one

# DRIVING PARTICIPATION

*with Beth Brodovsky*



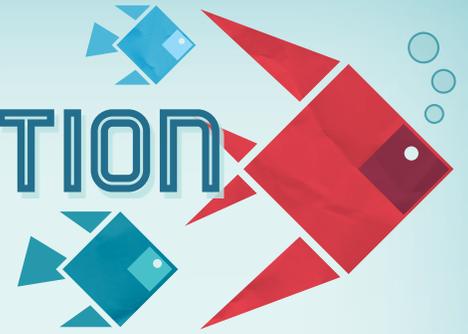
source of grant funding for a project in case one of them doesn't come through. That doesn't mean that you ask every one of them for 100% of the project, but you don't want to put all your eggs in one basket. In addition to finding friends of your organization that might want to support you, business sponsors are also a very good option because sometimes they will want "can we get our logo with a link to our website on your website for the first year as a community partner or as a sponsor or whatever" and that's the way folks get advertising and also they will give you business sponsorships for that type of thing.

**Beth:** I know this would be a problem of overkill, who knows if this even happens. Say you put in the money for two different organizations for a website redesign and you get both of them. What happens if you really don't need all that money to do the project that you do? Do you have to decline one or can you re-purpose that money for something else?

**Mandy:** Great question. You should always contact whichever program you want to, I usually pick the one that came last, and say "I just wanted to call and let you know that we have been blessed. We have received two grants. We did not expect to receive full funding from both of them, but we did. It's for the same project and this is what it's for. We have another need that's in the same realm of work. We would also love to do this with our marketing, but we really were just focusing on our first need and we just have more money. Would you prefer that we give you the money back that you granted us or would it be okay for us to put this towards this other project?". Nine times out of ten they're going to be cool with the other project if it's in alignment with the first project. You never make that assumption on your own. You always call the program officer and it's possible at any point in time that a funder can say "no you need to send the money back". Now they're not likely to ask for that because the way foundations work is they have to give away 5% of their assets annually if they made money. When stock markets crashed and they lost money, they didn't have to do grant cycles, but as long as they're making money they have to give away 5% of their assets annually. Every grant usually technically has a program report that you have to file at the end that tells them how you used the money. They use that so when they file their taxes they can report to the IRS how their money was used. If you have to give their money back, they have to find someone else to give the money to and that's a pain in the butt. I have on occasion had like a nonprofit will close their doors and have to give money back to a foundation. That foundation

# DRIVING PARTICIPATION

*with Beth Brodovsky*



will sometimes call me and say “we have to find somewhere to give \$7,000. Do you know a nonprofit who does xyz” and I’ll say ‘yes’, but most of the time they will say “as long as it’s in the same realm, send us some paperwork and we’ll send you something to fill out. Yes, that will be okay”, but you have to ask their permission.

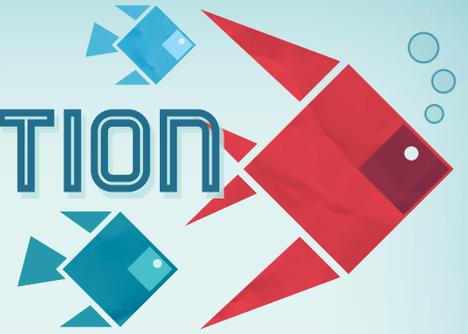
**Beth:** That I think is key and I’m really glad we made sure we got that in there. It’s also a good point to remind people pretty much anything, especially marketing, there’s always more you can do. If you want a website, maybe figuring out what your core is that you absolutely need to get to the next level and then what would be your phase two? What would be your bonus? What you would really say “if we could have anything, we would want that” and kind of keeping that in your back pocket going after that first set of money from two different people so that you are already prepared for if some reason this should happen, and I’m sure it does, that somebody gives you extra money you can say “we really wanted to add on these extra things, but we were going to save them. Can we apply your money to the phase two part of the project”. If you think in advance what is the full continuum of what you want done so you can react quickly, I’m sure that that really helps. I don’t think that a funder wants you to sit there on their check for months. It’s not going to look good. It’s going to look like maybe you were just using it for new toilet paper or whatever, which they don’t want.

**Mandy:** Another option is always depending on the organization, could we have marketing services for a year, ‘x’ number of dollars a month for the same person that’s done this website or this marketing for us to tweak, continue to add on, to help us improve, to help us grow, that’s a service that you probably aren’t going to pay for in a marketing project. They’re going to do the services and they’re going to be done.

**Beth:** Right. I think that’s key too because the reality is that marketing isn’t ever really done and we have both in my business. We have both project work and we have ongoing work. The reality is you can string together a bunch of projects or sometimes, especially with a web project, these days a website is never done and if your website is done, you’re doing it wrong because you constantly need to be writing and updating your events and possibly adding features. Right now it’s November when we’re recording this and every one’s talking about Giving Tuesday and annual appeals. People should be putting sections and pages up on their

# DRIVING PARTICIPATION

*with Beth Brodovsky*



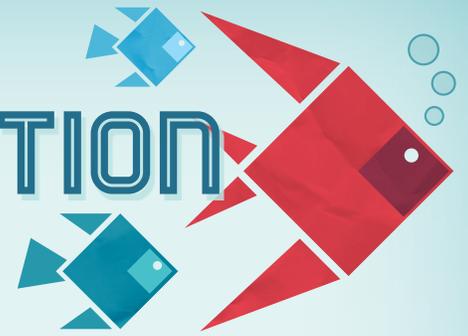
website about those things that they're doing. Maybe you're getting ready to run a fall annual event and you might need branding and stuff around that. In a lot of ways, you could look at that as a whole separate project for "we're going to design something for the event", but if it's going up on your website and you're designing a section on your website, you might be able to get event design and event materials paid for out of a web update budget if somebody has already approved something like that, right?

**Mandy:** Yes and the first thing that comes into my head is if I had extra money and I was working with someone who did design or marketing, I would say "could we put together a twelve month calendar. These are the events I have coming up for these twelve months. These are the things I'm going to need to make sure they are amazing. What can you do for me". That way, I have something in my back pocket if a funder says "what else can you do with this money". Well, we have someone who is going to help us really capitalize on these opportunities and teach us the process this year so next year we know how to do it and that way you have a teaching tool, a teaching opportunity and you still have money to pay someone else to do it really well for you the first year and at least you see the process, you learn the process and you can create your own calendar and say "this year I need to get Twitter stuff up for this event starting now" and you're going to learn the whole process, create your own calendar and then next year you might be able to do it yourself, but if not at least you have a calendar of what needs to be done.

**Beth:** I love that Mandy because especially what you said in the beginning. Funders like finite projects. They don't necessarily want to fund something that's going to have an ongoing expense to it and it's hard because there's always going to be another event. One thing that we do a lot of is we help people brand and customize their events or their newsletter or their very first email newsletter so it looks perfect and then the challenge sometimes is to get something to look as good as if a design firm did it and to continue it is challenging. We've come up with a bunch of different ways to try to templateize things and give things and put them back into the hands of the nonprofit so that it can sustain and maintain it. There's better ways to do that and more challenging ways to do it and it's all different. Some organizations we've done things using InDesign for example and then the organization was funded enough to get a copy on their own and we did a training for them so that they knew how to use that.

# DRIVING PARTICIPATION

*with Beth Brodovsky*

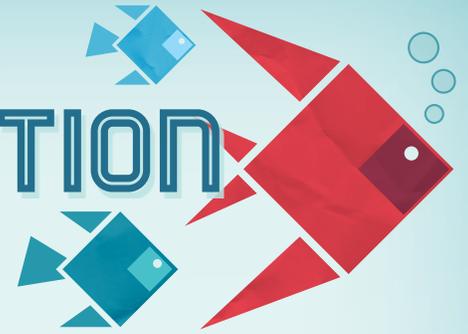


In other cases we have to use tools that they already have because there's not the skill or the budget or the ability to maintain that. It can be challenging if you say Mary's working here now and she knows how to use InDesign, but then Mary moves on to another organization and Susan comes in and she's never touched it before. Do you train her? It gets complicated. Being able to have templates and a design structure that you can then update and manage yourself at least gives you a fighting shot to say "this is what we're budgeting for the initial design and a set of templates. Next year we're going to be able to run with this". Sometimes we've had people that needed a tweak, like they might need a different graphic for the header of the email, but once we give that they can then insert it into the email and then do other iteratives of the email after that. You might need something tweaked or updated. Even we've done things that are events that have the 10th annual and so they just need the logo updated to the 11th annual, little things. Usually the small things after that, a lot of times an organization can afford to pay for that themselves because it's not crazy expensive.

**Mandy:** Here's the key to that. You put in your budget whatever it is, whatever kind of project. Marketing or campaign capital, it doesn't matter. Put into your narrative for your proposal that after year one that the additional revenue that was generated from this project in year two will sustain the organization's ability to spend 'x' number of dollars to continue working with a consultant. Okay, we've got this one template in year one so next year we're going to update all those templates. Money that we generated because we now have this wonderful tool for folks to have an easier pathway to us, it's going to have more business. We're going to have more business. We're going to have more people coming in the door so we're going to take a portion of that money and now we're going to use that to continue working with marketing folks in the future, but it will be at a much less cost, you're right. Folks like to see that. When people do programs when I write grants, we say "the revenue generated from program fees in year one will sustain general operating of the program in future years", but you don't have those program fees as the first year because it's the first year of the program. That's the perfect sustainability plan. That's what funders want to see. They want to know how you get to sustain this in the future. If you need it again, are you just going to come back to them? No, you need to have a plan in place.

# DRIVING PARTICIPATION

*with Beth Brodovsky*

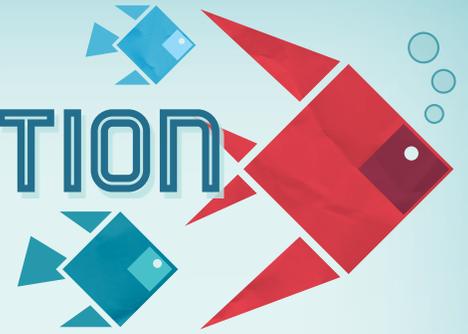


**Beth:** I love that because I think a lot of people want to get the marketing thing and the point of marketing is to raise money for the organization so you instantly want to take that money that you generate and dump it into your programming or dump it into your operations or pay for your own staff person or different things like that, but to really be able to treat it as “we understand that ongoing marketing is important so we’re going to take some personal responsibility to pay for it ourselves”, I would think that would really have a good impact on a funder because you’re right, otherwise next time you need something you’re just going to come back and say “I need more, I need more”. I would think that if you build a relationship with a funder, they would be more likely to say “thank you for helping us create our new branding, now we want to do a new website. Thank you for helping us with our website, now we need to create a newsletter template”. Evolving and moving on to the next thing and saying thank you, you helped us create our newsletter template, we put an envelope in that so everytime we do our newsletter that gives us enough money to pay for next month’s newsletter so we don’t need you for that anymore. Now we’re going to move on to whatever the next thing is. To be able to demonstrate that you did that, if you say that you’re going to do that to a funder though, are you held to it? Is that part of the contract with the funder?

**Mandy:** It depends on if you write it into your goal’s objectives. I’ve worked with a funder once, we got funding from this nonprofit foundation for years and then one year we didn’t overestimate what we could do, but we missed one of our percentages on one of our goals and objectives and the funder said “if you can’t accomplish what you’re saying you can accomplish with the funds we’re giving you, then we’re going to fund someone else”. They didn’t fund us for several years. We said we could have a 12% increase in a program and it ended up being like 8% and so we didn’t accomplish what we said we were going to do. Yes you are held accountable for what you do, but it’s not like they’re going to say “pay us our money back”. The other thing is you eventually want to become self sustaining so you don’t want to think every year “what’s our marketing project? Let’s go get a grant for it”. You want to eventually want to be able to say “what’s our great marketing project that’s going to bring in more revenue so we don’t have to get a grant”. No nonprofit should be more dependent on grant funding than 30%. If you are more than 30% on grant funding, you’re in a bad place. The goal should never be to write grants every year if you don’t have to and I’ve worked at organizations who have never written grants, which is awesome, but they’re out there for a

# DRIVING PARTICIPATION

*with Beth Brodovsky*

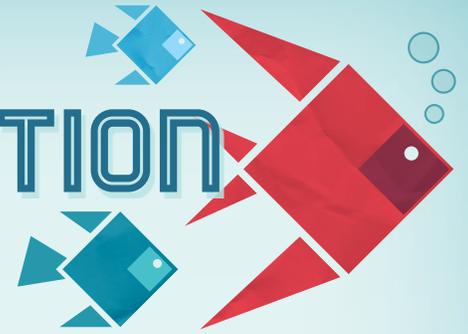


reason and you should utilize them when you need them and then try to figure out a plan that helps you to sustain your organization and grow it from the inside.

**Beth:** We're getting close to the end so I just wanted to make sure that we touched on what we were talking about earlier, the chicken and the egg. If you've never done this before, if you've never done a website before and you have no idea what a website should cost, or for example a branding project should cost, how do you balance when to bring in the consultant or the vendor or somebody with when to communicate with the funder? In my organization we've been in both situations. We have been asked to do a full RFP response and we'll say things like "how much money do you have" and then as all clients do, they say things like "well we're hoping that you'll tell us that", which can be frustrating as a consultant and someone who responds to RFPs and responds to proposals when somebody has absolutely no idea what something should cost and absolutely no idea if they're going to be able to get it. For example, doing a website or even doing a branding project is kind of like buying a car. Do you want it to start and stop when you want to or do you want it to start and stop and have a great sound system and look gorgeous? They both get you to where you want to go, but there's lots of levels between a basic car and a high end car. How does somebody, I hate to say, get what they need out of a vendor to ask them to respond in a way that can give them a sense of what something like this is going to cost without asking them to basically imagine what this project can be and plan out an entire project, which may or may not have any basis in reality or do-ability. I could easily envision a website project that costs \$100,000 but if I have no idea if that's even on your radar for something that you're going to get, it's a waste of both of our time. On the flip side, I have another organization that we're talking to about a website, they already secured their grant. What they got is pretty much less than half of really what somebody would need to do all of the even basic things that they want to do within a new website to make it worth the time and the effort of upgrading. It's heartbreaking to me that they made the effort to get this money and they're either going to have to go with a less expensive resource or they're going to have to get less than what they really wanted or they're going to have to wait until they can secure the rest of the money that they need to do it. How do grants know? What's the best way to approach that?

# DRIVING PARTICIPATION

*with Beth Brodovsky*

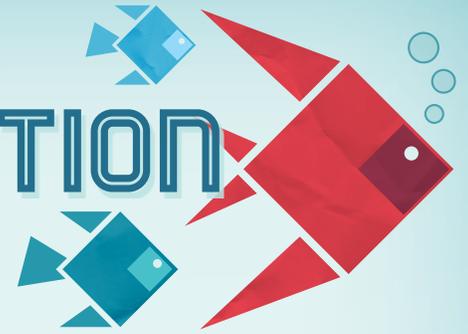


**Mandy:** I think the folks that are looking for any type of funding have to do their leg work to figure out what they want. If you're going to do a construction project, you have to go out and say "this is a model that we like" or "this is what we want here" and "this is what we want there" and "this is the type of material we're hoping to use" because if you can't give someone an idea of what you want, it's impossible for them to tell you what it's going to cost. My recommendation, especially in the marketing world and I am not a marketer, I'm not a designer. I totally say that all of the time, but what I do is I find something I like, I take a picture of it and I send it to my marketing girl and say "I want something like this and this is what I want it to say and these are the colors I want it to be". She does it. Or I'll go to Hallmark, find a card and I'm like "I think this is a good concept, but I'd rather have this animal and this scene and these words", can you do that? She says "yes" or when I was designing a website for some nonprofit, well I wasn't designing it, but I was helping them decide what they needed, we would go online and find websites they liked and say "what features from this website do you like" and we may find three or four. We send those to the artist and we say "this is what we liked from each one, how much will this cost" because that way it leaves the person on the other end of the computer has an idea of what you're looking for and they can tell you "if you want that in Flash or if you really want this to be able to happen, this is how much it's going to cost". Then I can say "I really like it, but I don't like it that much" or "I really like that. We can do that" so from my perspective, they need to do work on their end and send something to the marketing folks to say "this is what we like". Now if they're just giving you carte blanche and saying whatever, well you tell me how much you're willing to spend and I'll design something around that. Those are the two ways to go that takes the work off of the marketing person's lap and really put's it in the nonprofits, which is where it should be.

**Beth:** I think that is really important to be able to say "where do you get people involved" and we get a lot of RFPs and I feel like a lot of them end up not ever getting executed because they either had no idea that they were asking for something that would cost that much and they had no idea if it's really \$10,000 more than they expected. They didn't even have any idea of where they would go to get that kind of money. One of the things I often recommend is for people to start not even doing the whole RFP process. Everyone knows some people that can do some things. Ask your board members if they know anybody. Ask

# DRIVING PARTICIPATION

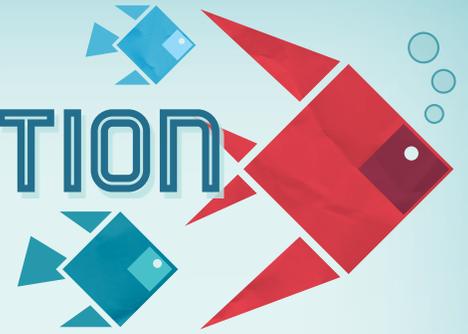
*with Beth Brodovsky*



your friends. Ask your family. We're starting to talk to some people about this. Ask some people that are in the nonprofit world "who do you work with" and ask other peers. You all have friends in nonprofits. You've all built your community. Who do you work with? Who can I talk to? Talk to different types of companies. You have two approaches when getting just general information with people. You can find three comparable companies. We're a mid-sized firm so we're about seven people, we're about eighteen years old so you can find three look alike companies that all seem to provide services at the same level and see are there variations in services and prices within people that are the same. That's one way to go about it. The other way to go about it is to find three different companies. You can get an advertising agency, you can get a small creative web firm and you can get a freelancer and say on the range of the skill base and the range of services that are available, are there different prices, but you have to understand that there's going to be inherent price differences in the business models with that, that may have nothing to do with your actual project. The thing I often advise people is in addition to getting some people that are recommended and referred, make sure you look at the type of business that you're talking to so you can really see "am I comparing apples to apples companies and their prices are different" or "am I comparing the difference between somebody that has an office, an overhead and expensive website developers vs. somebody that's working out of their basement who maybe has a day job and is doing web development on the side". Not that one is better or one is worse. It's really what's right for you and to understand that there may be differences in price that have nothing to do with skill, but also has to do with people's businesses. It will really help you to understand the right people to get pricing from so when you get your range of prices back that you don't misunderstand what they might mean. If your price is up here, what am I getting for that? Is that something I really need? Don't automatically look at a high price as too high, especially if the goal is to get a grant to cover the cost. Really look at what you need and who is going to be the best provider for you for it. Talk to them first. You can easily have a conversation on the phone or bring them in to meet with them. I am now at a point where I will not do an RFP for somebody unless I can go in and have an in person conversation with the people who are making the decisions because many times if they're doing an RFP - you haven't done an RFP before. People don't know what they're doing so they go and they ask their friends or they go and search on Google for examples of RFPs and cobble it all together. It may not even be the best request and if you sit down and have a couple of conversations

# DRIVING PARTICIPATION

*with Beth Brodovsky*



with people, people who know what they're doing, people who are vendors will ask you questions that will make you think about what you really want and how you would go about doing it in a way that you might not have thought of if you're just copying somebody else's website or branding RFP that you found online. There's conversations that will maybe make you think about what you really want, make you think about how to really go about the project and if you get a couple of those people in, they will be able to give you just even verbally a range. I'm sure some granters want to have an actual RFP to look at, from when someone is submitting something, what do they need? Do they need a proposal? Do they need a full on RFP? When you're corroborating those numbers that you say "we need \$10,000-\$25,000 to do this project" what does a granter want to see to confirm that that's actually an accurate quote?

**Mandy:** It depends on if the grant is just for that project where if it is for a lot of other things. So if it's for a capital campaign that's going to be way more than \$25,000 in expenses, they may want a small break down like at that \$25,000 we're going to spend roughly \$7,000 on this and \$5,000 on this. They don't necessarily need a whole lot more detail, but if the only thing you're asking them for is marketing money, they're going to want to know where every penny of that \$25,000 is technically going. You'll want to break down on a quote.

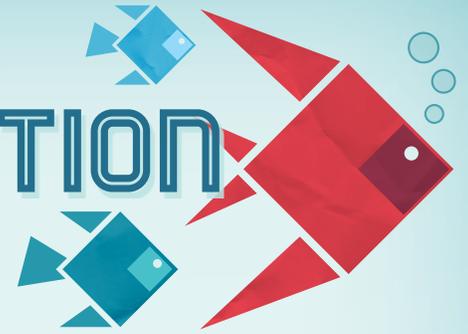
**Beth:** We need to wrap up now. I just wanted to say thank you so much. These are so many great ideas. I really, really appreciate your time and I want to let the listening audience know that Mandy and I are actually going to be doing a webinar in 2015 about capital campaigns and planning for something like that. Stay tuned, follow [www.iriscreative.com](http://www.iriscreative.com) or [www.nonprofittoolkit.net](http://www.nonprofittoolkit.net) and we will be letting you know when we are launching that webinar that will give you some ideas about how to put together a project if you're going to be doing a capital campaign. Mandy, how can people get in touch with you if they want to learn more?

**Mandy:** You can visit my website at [www.FundingForGood.org](http://www.FundingForGood.org), you can email me at [Mandy@FundingForGood.org](mailto:Mandy@FundingForGood.org) and you can visit me on LinkedIn, Mandy Pearce. You can reach me in lots of places.

**Beth:** Thank you so much. I really appreciate your time and all of your great ideas for people.

# DRIVING PARTICIPATION

*with Beth Brodovsky*



**Mandy:** Well I just want to let folks know that if you have listened to this podcast and you have an interest in grant research to help you get started and save you some time, as long as you reference this podcast Driving Participation then you can get \$50 off the research fee so when you call me or email me, just reference that and that will not expire.

**Beth:** That is such a great gift to all the listeners. Thank you so much for offering that to people. I think people can really, really appreciate that. One of my other things that I hear from people and from other grantwriters is people saying “now we have to pay for you to even get us this money and we may or may not get it” so being able to have a professional that can not only come in and write it with the right language, but help you align your request to the right people is such an asset and the likelihood that you’re going to get what you want by having that and now being able to do it for with a discount is a terrific gift. Thank you so much for offering that to everyone.

**Mandy:** You’re welcome.

**Beth:** Alright. Take care.

**Mandy:** Bye.

# DRIVING PARTICIPATION

*with Beth Brodovsky*



# DRIVING PARTICIPATION

*with Beth Brodovsky*



# DRIVING PARTICIPATION

*with Beth Brodovsky*



# DRIVING PARTICIPATION

*with Beth Brodovsky*



# DRIVING PARTICIPATION

*with Beth Brodovsky*



# DRIVING PARTICIPATION

*with Beth Brodovsky*



# DRIVING PARTICIPATION

*with Beth Brodovsky*

