

**Sealing the Deal:**  
Making a Compelling Case  
for Funding  
with Private Foundations

Welcome!

The webinar will begin at 2:00 p.m. CT



TEXAS  
HISTORICAL  
COMMISSION



**REAL PLACES TELLING REAL STORIES**



# THC Museum Services

- **The Museum Services Program provides support, resources, and training to museums in Texas.**
  - *Consultations*
  - *Webinars and workshops*
  - *Resources*



# THC Museum Services

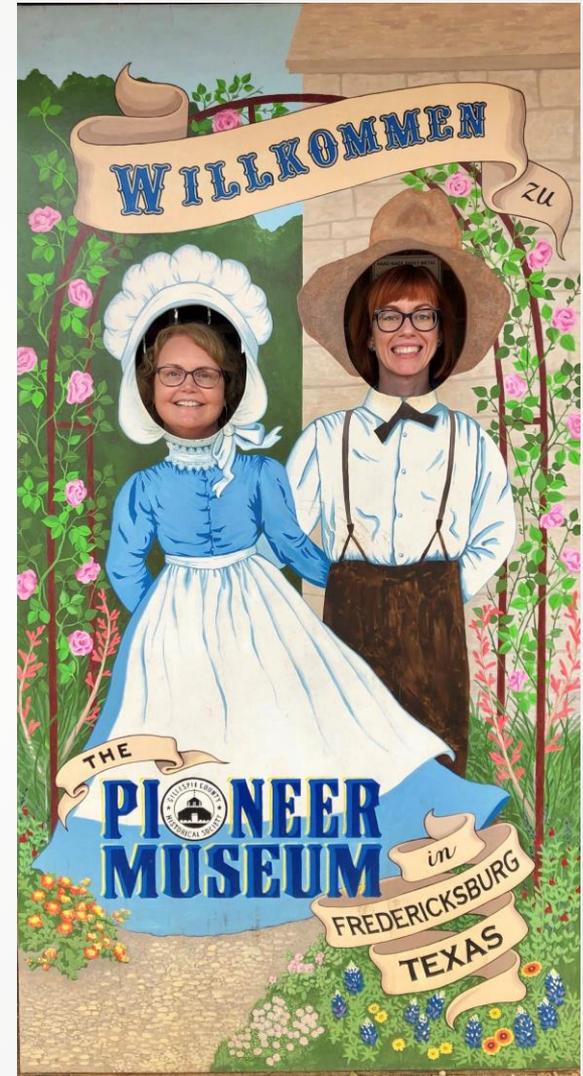
[www.thc.texas.gov/museum-services](http://www.thc.texas.gov/museum-services)

- On our webpage:
  - *Webinars*
  - *Workshops*
  - *Grants and Fundraising*
  - *Helpful Resources*
  - *Connect and Learn*



# THC Museum Services

- **Laura Casey**  
*Museum Services Program Coordinator*  
[\*laura.casey@thc.texas.gov\*](mailto:laura.casey@thc.texas.gov)  
*512-463-6427*
- **Emily Hermans**  
*Museum Services Program Specialist*  
[\*emily.hermans@thc.texas.gov\*](mailto:emily.hermans@thc.texas.gov)  
*512-463-5921*





# Upcoming Free Webinars

- **Bringing Objects & Artifacts to Life**
  - *Thursday, February 27, 2:00 p.m. CT*
- **Appraising and Insuring Historical Treasures**
  - *Tuesday, March 3, 2:00 p.m. CT*
- **Social Media and Your Cultural Organization: Where to Start**
  - *Tuesday, March 24, 10:00 a.m. CT*



# Dreanna Belden





# Sealing the Deal: Making a Compelling Case for Funding with Private Foundations

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Texas Historical Commission Webinar

February 11, 2020

Quick poll:

Have you written a grant before?





# Discover and Locate Potential Funders

- Grants and Fundraising resources on the THC website
- Candid (formerly the Foundation Center)
  - Funding Information Network
  - The Foundation Directory Online
    - Profiles for over 166K foundations
- Always carefully review their website if one's available

All resources mentioned in this webinar are listed on the Resources document with links

Quick poll:

How many people have used the  
Foundation Directory Online?



# Discover and Locate Potential Funders: Using The Foundation Directory Online

The screenshot displays the Foundation Directory Online search interface. At the top left is the logo for "FOUNDATION DIRECTORY ONLINE Professional". The top right shows a user profile for "HI UNIVERSITY OF NORTH TEXAS...", a "HELP" dropdown, and a chat icon. Navigation links for "FIND FUNDING", "PATHWAYS", and "RESOURCES" are visible. The main heading is "Find Funding", with a breadcrumb "Find Funding > Search Results". Below this, it states "SHOWING RESULTS FOR 'Arts and culture', Texas (United States)" with a "CLEAR ALL" link. The search filters are organized into several sections: "Subject Area" (Arts and culture), "Geographic Focus" (Texas (United States)), "Population Served" (Who will be affected. Ex: At-risk youth, Veterans), "Organization Name" (Name of specific grantmaker or recipient), "Location" (Location of grantmaker or recipient), "Who's Who" (Someone serving in organization), "Support Strategy" (Type of program support given/received), "Transaction Type" (Type of monetary support given/received), "Organization Type" (Type of grantmaker or recipient), "Grant Amount" (slider from \$0 to \$10,000,000,000), "Year(s)" (slider from 2003 to 2020), "Keyword" (Search for a specific term across all FDO), and "EIN / BRIDGE Number" (ID Number of Organization). A "SEARCH" button is located at the bottom right of the filter section. Below the filters, a summary bar shows: 4,125 Grantmakers, 73,116 Grants, 4,265 Recipients, and 21,903 990 Tax Forms. Each summary item has a dropdown arrow and a corresponding "View" link below it.

FOUNDATION DIRECTORY ONLINE  
Professional

HI UNIVERSITY OF NORTH TEXAS... HELP CHAT

FIND FUNDING PATHWAYS RESOURCES

Find Funding > Search Results

## Find Funding

SHOWING RESULTS FOR "Arts and culture", Texas (United States) [CLEAR ALL](#)

[Close Advanced Search & Filters](#)

**Subject Area**  
Arts and culture

**Geographic Focus**  
Texas (United States)

**Population Served**  
Who will be affected. Ex: At-risk youth, Veterans

**Organization Name**  
Name of specific grantmaker or recipient

**Location**  
Location of grantmaker or recipient

**Who's Who**  
Someone serving in organization

[Include U.S. Federal Funders](#) [Additional Filters](#)

**Support Strategy**  
Type of program support given/received

**Transaction Type**  
Type of monetary support given/received

**Organization Type**  
Type of grantmaker or recipient

**Grant Amount**  
\$0 \$10,000,000,000

**Year(s)**  
2003 2020

**Keyword**  
Search for a specific term across all FDO

**EIN / BRIDGE Number**  
ID Number of Organization

**SEARCH** [Chat with an Expert](#)

**4,125 Grantmakers**  
[View Grantmakers Only](#)

**73,116 Grants**  
[View Grants Only](#)

**4,265 Recipients**  
[View Recipients Only](#)

**21,903 990 Tax Forms**  
[View 990 Tax Forms Only](#)

# Discover and Locate Potential Funders: Using The Foundation Directory Online

The screenshot shows the 'Foundation Directory Online Professional' search results page for 'Grantmakers'. The search criteria are 'Arts and culture' and 'Texas (United States)'. The page displays 4,125 grantmakers and includes various filters and sorting options.

**FOUNDATION DIRECTORY ONLINE Professional**

HI UNIVERSITY OF NORTH TEXAS... | HELP | CHAT

FIND FUNDING | PATHWAYS | RESOURCES

Find Funding > Search Results > Grantmaker Search Results

## Find Funding: Grantmakers

SHOWING GRANTMAKER RESULTS FOR "Arts and culture, Texas (United States)" **CLEAR ALL** **EDIT**

**Close Advanced Search & Filters**

**Subject Area**: Arts and culture

**Geographic Focus**: Texas (United States)

**Population Served**: Who will be affected. Ex: At-risk youth, Veterans

**Organization Name**: Name of specific grantmaker or recipient

**Location**: Location of grantmaker or recipient

**Who's Who**: Someone serving in organization

Include U.S. Federal Funders

**Additional Filters**

**SEARCH**

### Grantmakers (4,125)

TOOLS | PDF | GRID | PRINT

#### GRANTMAKERS FILTERS

Past Funders Filter

Exclude grantmakers not accepting applications

**Include** | Exclude | Only

**Assets**: \$0 - \$100,000,000,000

**Total Giving**: \$0 - \$100,000,000,000

**Chat with an Expert**

<input type="checkbox"/> Grantmaker	City	State	Country	Total Assets	Total Giving	Amount Funded	Grant Count
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# Discover and Locate Potential Funders: Using The Foundation Directory Online

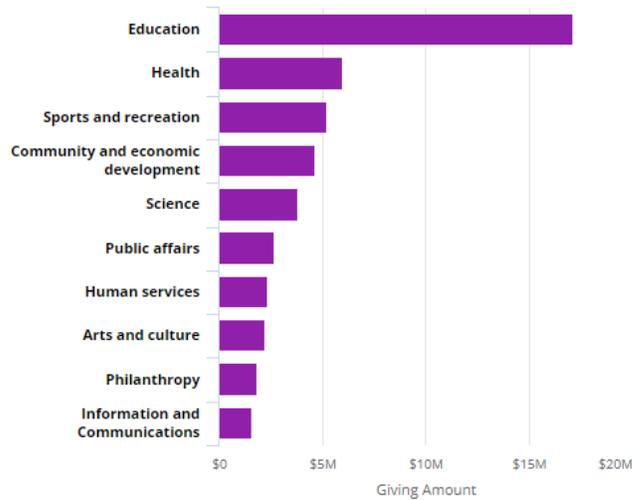
## Dodge Jones Foundation

Abilene, TX, United States | [Who's Who](#) | [+ Contact Info](#)

### Dodge Jones Foundation Most Recent 5 Years At A Glance

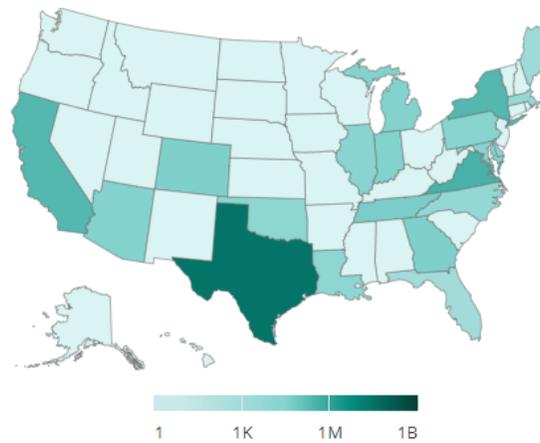
They've funded 667 grants to 263 organizations totaling \$29,434,182

What Is Being Funded?



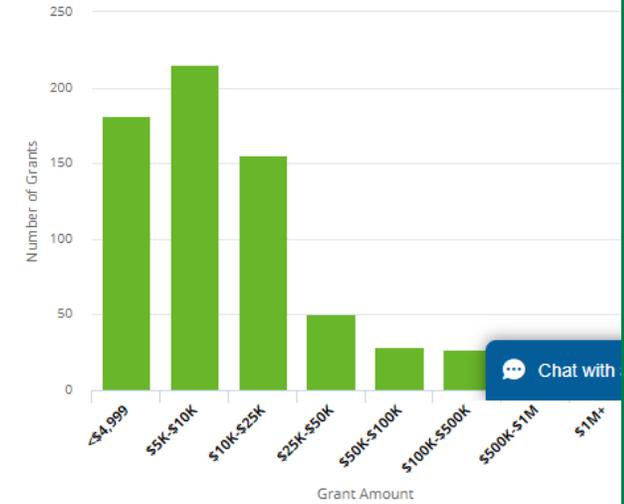
[View Each Subject with More Detail](#)

Where Is The Money Going?



[View Each State with More Detail](#)

How Big Are The Grants?



[View Each Grant with More Detail](#)

GRANTS

FUNDING INTERESTS

Grants

# Is it a good fit?

- Do they accept unsolicited proposals?
- Do their goals align with yours?
- How will your proposal meet their program goals?
- When do they meet and review grants?
- What can you find out from their 990? (let's take a look at one)



Quick poll:

Are you familiar with the IRS 990 form?



# The beautiful 990

- If you have a name of a foundation, you can get their 990s from Guidestar
- Compare the submission guidelines to their profile
- Double check whether they accept unsolicited
- If you can't easily get to a location with the Foundation Directory Online, there's much useful information here for you
- Let's look at one briefly





# Approaching a foundation

- Call them. I repeat: CALL THEM.
  - Unless they say not to do this
- Get a meeting if you can
- Leverage your board or other connections for introductions
  - If they only give to pre-selected, this would be your only way in

# What are they looking for?

*Every* foundation is different, every single one. A proposal format could be:

- A Letter of Inquiry (LOI)
- An online submission form
- An application package
- A list of questions they want addressed in a written proposal to be mailed
- Any attachments they want to see

Let's look at some examples:





# What are they looking for? The Letter of Inquiry

- Always state the amount you need
- No more than two pages
- Components
  - Intro/Executive summary
  - Organization description
  - Statement of need
  - Methodology of project/need/workplan
  - Other funding sources
  - Final summary

<https://grantspace.org/resources/knowledge-base/letters-of-inquiry/>

# What are they looking for? Online Forms

- Name of Organization
- Contact Info
- Primary County where services provided
- Project Title
- Organization's purpose and history
- Describe the nature and extent of the problem you will address
- How does this proposed effort relate to the Foundation's program goals
- Describe how the population to be served has previously been involved or will be involved in developing solutions
- Program objectives and evaluation
  - Evaluation criteria
  - Evaluation methods
  - Information to be collected
  - How info collected
- Plan of work
- Project start and end date
- Personnel responsible for program
- Estimated cost for the project
- Amount requested from Foundation
- Rational for amount requested

# What are they looking for? Attachments

they may possibly ask for all, some, none of these, or for others!

- IRS determination letter proving non-profit status
- Latest audit
- Last 990s
- Complete organizational budget
- Project budget
- List or bios of board members
  - What proportion donate?
  - Diversity of board
- Demographics of audience served





# Making a compelling case: the groundwork

- Be prepared and do the homework
- Follow directions
  - cross the t's, dot those i's
- Provide thoughtful responses to questions
- Put your best foot forward
- Make it easy for the reviewer

# Making a compelling case: the narrative

- Tell a story
  - State the problem
  - How will you solve this issue?
  - How will their support make a difference moving forward?
- Add an interesting anecdote
- Feature a person who will benefit
- Make it clear – you have the resources and personnel to accomplish all this





# Making a compelling case: make it strong

- Be clear, concise, and to the point
- Bullet points are your friend
  - Workflow
  - Methodology
- Don't use jargon
- You are writing for a lay person
- Action verbs, action verbs, ACTION VERBS
- Keep an online thesaurus open while you write
- Less words are better

# Making a compelling case: get feedback

- Have non-experts read your proposal
- Have experts read your proposal
- Have grammar goddesses and gods read it





Advice: the road to success is paved with some failures

- You can do this
- Don't give up
- Try, try again
- Don't take it personally

Questions?

Dreanna Belden  
dreanna.belden@unt.edu