

SO, YOU WANT TO BE A FUNDRAISER?

**Sheri Barton Trbovich
The Clark Foundation
Salt Lake City, Utah**

In these times of *tight budgets* the reality of fundraising suddenly becomes a necessity for many planetarians. Feel like you're venturing *where no person had gone before*?

Well, take heart, you're not alone and many others have successfully treaded this path before you. Here are some tips that I've found helpful over the years in soliciting federal grants, corporate and foundation funding, and individual gifts. This article is not intended to be the end all guide to fundraising - true fundraising is an involved process that you learn by doing and should be intricately woven into your overall operational budget and program planning processes. Now, if you live by the maxim you *won't get it if you don't ask*, then you're ready to start.

First of all, be aware of what you're getting yourself into. Most people consider grant writing to be the core of raising money. However, writing grants are just one aspect of fundraising that one encounters in an overall funding campaign. Large organizations, such as museums and science centers, often have a development office with several staff members working together to raise funds for a variety of programs. The development personnel along with the organization's managers divide their time and talents researching and writing grants, attending meetings with corporate and community leaders, and hobnobbing with representatives from various government agencies. Development departments also make use of the parent organization's board members as sources of funds and as fundraising partners. If you're in this business alone or with limited resources then you'll find yourself wearing several hats—there's really more to this than just writing a grant or filling out forms. If you are in this business without the benefit of a development office—consider putting together your own volunteer fundraising board or committee, even if it's comprised of some of your friends or members of the local astronomy club.

Do you need more money?

Do you *really* need more money or donations of in-kind equipment and services? This at first may sound like an odd question; of course everyone needs more money! But take a moment and think about it—what would you do with additional money if someone ran in the door right this minute and gave you a check? Immediately a list the length of your dome leaps to mind. You'd be able to buy that new video projector you've been wanting, or upgrade that wheezing audio deck that threatens to expire on a daily basis, or perhaps you'd expand services and hire another part time presenter/lecturer—the possibilities always seem endless.

Good, now that you know what you want—*why* do you need it? Think about your institution carefully and try to explain to an imaginary panel of donors just what the *tangible* and *measurable benefits* to audiences will be if they accept your funding request. Will a greater number of students understand the subject matter better if you enhance your programs with that new video projector or audio deck? Will you be able to bring in more visitors to raise attendance and revenues with additional shows run by an extra presenter? Can these assumptions be verified with pre- and post-testing or marketing surveys? You need to describe and quantify the *specific* benefits of this donation. When you have answered these questions in a thoughtful and thorough way, you are well on your way to developing a fundraising campaign.

How much money do you need?

Your first thought is LOTS! Be wary of setting a goal that is too high; be both realistic and able to justify the cost of your program enhancements. A well-founded budget is worth the time you spend in researching costs and time estimates. Above all, if you ask for funds to develop new programs or services, make sure you are able to justify the extra time you and/or additional staff will spend on these new projects. Also be aware of the problems often encountered in receiving startup funds for new programs and then facing the unfortunate reality of being unable to sustain a level of funding necessary to maintain these new services.

Keep in mind that most givers don't like to fund operating expenses. They want to be able to see, touch, or experience the results of their donations in the form of tangible programs or equipment. The key to pleasing the donor is researching their past giving history and matching your needs to their giving parameters.

What do you have to offer them in exchange for their support? Various givers look for good advertising with a reputable organization (put their name prominently on the newsletter, news releases or printed products). Others appreciate an association with other grantors you have successfully solicited to support your program—matching funds from several sources is always a plus. Individuals often want to feel a sense of belonging or see their names attached as a legacy to a reputable community program or institution. Make sure you ask for **big** bucks to *permanently* attach someone's name to a program or item.

Know your audience.

Whom do you serve? Do they know that they need your services? At first this may seem to be a odd question; however, think about whether the audience you serve would be willing to partner with you to convince a granting agency to give you money. Think of the validity added to your pitch if a teacher whose students you serve is willing to go with you and personally testify about the difference your programs make to her students and their understanding of science. Have you conducted a recent marketing survey? Are you providing the types of programs that the teachers and public want to see? If your answer is "they don't know what they want," then I'd suggest you try asking sometime—you might be surprised.

Developing a good reputation.

Now comes another consideration in building your campaign... Who are you and how long have you been working in the planetarium education field? Does your institution have a reputation for developing and/or delivering quality programs? The bottom line with donors often comes down to whether you have a good track record. If you are just starting out *alone in the world*—with enthusiasm and great ideas—your campaign will be much tougher to establish.

Fortunately, most planetarians are not alone in the world. If your planetarium is part of a school or museum, consider using their management or development office resources to help you plan your capital campaign and introduce you to the right folks. No matter whom you work for or who you are seeking funding from—*people give to people*—you need those introductions. Try to get someone who knows and respects you to introduce you to the people in the decision-making positions in

any foundation or company you approach—even if you establish a relationship by correspondence or phone. This is true even for an organization like the National Science Foundation. Getting to know NSF's Informal Science Director may be difficult at first but your grant will do much better if he gives you his personal opinion on your program.

Another way for organizations to gain a good reputation is to team up with other agencies or institutions that provide public services similar to yours and who are willing to join with you in some of your projects to "lend" you their good reputation. Do you work for or know the staff of another museum or school system? Do they sanction your efforts to seek funding for support of your programs? Will they put their name on the grant and go with you to make the pitch for funding? Each situation has a unique formula and agenda for raising funds. Find out how it's done in your organization and make sure you know the players well.

Finally, do you personally know the science curriculum director at the office of education and, more importantly, do they know and appreciate your programs? There is usually a network of school district science coordinators within in any local secondary school area and you may find it useful to introduce yourself to these folks, make sure everyone knows about your programs, and solicit ideas and additional contacts for fundraising. Does your state have a science advisor? A person in this position often sees many grant opportunities come across their desk. Is there an opportunity for applying for funds within your city, county, or state governments? Outreach programs are great for securing money from governments for services in neighboring districts -- if you can't come to us, we'll come to you! Are there aerospace organizations you can contact? Just to mention a couple – there are NASA Space Grant Consortiums in every state of the U.S. – the national website is (<http://calspace.ucsd.edu/spacegrant/>). Another good organization is The American Institute of Aeronautics and Astronautics – their web site can be found at (<http://www.aiaa.org/>).

Don't underestimate the importance of good planning and communications.

Another consideration in the field of capital campaigns is the organization and coordination of programs within your own museum or school system. Make sure you are faithful in communicating with the *powers that be* about your plans for soliciting funds. After careful consideration, you may have decided to seek funding from a specific corporation or government agency. However, the management, board, or development office of the school or museum you work for may have

already approached this same source with a current or ongoing solicitation and you suddenly find yourself working at cross purposes with the very folks whose good opinions you need. Or you may even find your hand slapped for well meant but misguided intentions.

People give to people.

One of the most important considerations in fundraising is to understand that *people give to people*. This principle holds true all the way from the small private foundations to the large federal agencies with millions of dollars to disburse every year. Who you know is as important as how good your proposal looks on paper. Sound familiar? That's the way the world works. Cultivate potential givers *before* you solicit funds. Put yourself in the position of a funding officer having to decide after reading many fine proposals which worthy program will receive the limited funds available. Among those proposals on the table is there one that catches the eye? The donor remembers meeting the sincere, hardworking planetarian who took the time to really get to know the foundation and the type of projects they support *before* submitting the all-important grant.

Why do people give to people?

One of the exercises you'll find more useful throughout this process of fundraising is to put yourself into the shoes of the person or organization you are soliciting. Why would someone want to give you money? Often the answer can be found by talking with influential community members who are personally associated with or touched by your organization. Are there members of organizations you know who are influenced and impressed by what you do? Ever hear the comment, "I never have time to attend the planetarium's shows but I think our community should have one." Keep in mind that giving often fulfills an individual's needs to be of service and both individuals and foundations are usually committed to improving the quality of life in their communities. Therefore, build upon the fact that they perceive that your programs offer an essential community service. Find people who share your vision for the need to improving science education in your community.

Research your donor.

Another important aspect of grant writing is to emphasize research. Really get to know the agency or individual you are asking for money—what are their interests, visions, and background. Most companies and foundations readily state their vision and the type of programs they give to. This information can often be found in your local library—ask the librarian for the names of any foundation directories they may have or if they do not have one ask where is the nearest library with a foundation directory. These directories may be local, statewide, or national and will list companies, foundations, and other non-profit agencies with giving programs. The directory will also state how much money each of these agencies grant every year, what organizations have recently received money, and the type of programs that the agencies give money to. It is a waste of everyone's time to pursue a donation from an organization that has no connection or interest in your programs.

Using the Internet.

As a whole, foundations and non-profit organizations are behind the times in getting information about themselves on the Internet. However, in our rapidly changing technological world this type of research is worth pursuing, if you have access to the Internet, as it is an easy way to gather and update information.

Here are a few useful URL's:

- National Science Foundation (<http://www.nsf.gov>)
- Philanthropy Journal Online (<http://www.philanthropyjournal.org>)
- The Foundation Center - Grantmaker Information (<http://fdncenter.org>) and
- The Foundation Center's Philanthropy News Digest (<http://fdncenter.org/pnd>)
- Yahoo (www.yahoo.com/society_and_culture/issues_and_causes/philanthropy/)
- NAESP Grant Info-link (<http://www.naesp.org/ContentLoad.do?contentId=50>)
- Eisenhower National Clearinghouse (<http://www.enc.org>)
- National Foundation for the Improvement of Education (<http://www.nfie.org/grants.htm>)
- The Grantsmanship Center (<http://www.tgci.com>)
- The Online Nonprofit Information Center (<http://www.socialworker.com/nonprofit/nphome.htm>)

Please realize that as soon as the above information is published it is out of date since URL's change as often as the weather.

Letters or statements of recommendation.

Here are suggestions for gathering more details that will serve you long and well. Think of everyone in the community that your program impacts and those who benefit most from your continued existence or from an expansion of your services. If you are serving the secondary student and teacher populations, have you established a relationship with a particular school, district, or state office? Does the principal, superintendent, or state science coordinator acknowledge the merits and benefits of your program? Are they willing to go to bat for you with a granting agency or will they *write letters of support* on your behalf or even go with you to meet with the heads of the foundation or corporation? Get letters of support from everyone you can think of—you don't have to use them all at once—but it's good to have them in your files for when you do need them.

Writing the grant.

Thought we'd never get to this part? But now this part is easy if you've done your homework and defined your needs, cultivated your donor, and firmed up your support. The "Fifteen Strategies" as listed by Rick Crosslin in this Section are good guidelines, but above all other considerations *make your proposal presentable and readable*. You'll never get to first base if no one reads your proposal and no one will ever read it if it looks sloppy or if it appears to be an endlessly tedious task. Be as brief as possible, put your supporting documents in an appendix, and format the body of the grant to highlight the important points so the reader can scan through your document and can easily get the basic idea behind your request. *Design* your document with enough white space on the pages so that it does not appear to be a tedious task to read. If you consider yourself a technical writer, don't hesitate to seek help from someone you respect that can write in a *readable* style. Most of your proposals will not be read by people with technical backgrounds. Even if they are, it is always easier to read a proposal written in simple English.

The tone of your writing should exude confidence and success without being cocky. Explain and/or write out or briefly explain your specialized terminology. Don't *ever* make your reader feel stupid

because they don't understand terms that are specific to your profession – the reader will probably *not* be well versed in science let alone planetariums. Tailor your grant to the giver and if possible target your request to the specific parameters of the person or group that will be deciding which grant will receive funding. Picture yourself as a foundation officer picking up the grant you are about to submit. It is the last one in a large stack of proposals at the end of a long and tiring day -- what would *you* want to read under those circumstances? Make it as interesting as you can as briefly as possible while being as thorough as needed. Borrow some successful grants and *study* their style.

Finally, be *accurate* – triple-check your facts and budget! Especially at the level of federal grants be very specific and accurate in your budget and document the statistics you quote.

Take the money and run?

Ok, you've successfully received your grant or donation. Now what? Go spend the money or pick up your in-kind donation of course. However, the story does not end here. If you expect to continue in this business of asking for and receiving grants you need to treat your donors well. Did you get as much as you asked for? Don't *ever* express disappointment with the amount of the gift – but on the other hand don't assume that you aren't expected to come back for more in the future. Does the giver have an established method of receiving feedback on the results from the donation? In many cases there is not a formal reporting mechanism but that doesn't mean that you are relieved of the responsibility of informing the donor of the impact of their gift on your program. In other instances there are established guidelines for maintaining the grant, i.e., forms to be filled out periodically for reporting exactly how the money is spent and a summary of tangible results and in some cases samples of the product produced with grant funds. The National Science Foundation is a good example of the latter case of grant maintenance. Just remember that in this business people give to people and people also talk to people. Thank your donors often. How much time and effort you put into this phase of fundraising will greatly determine your degree of success at fundraising not only with your current donor but also with other donors you approach. After all you can usually assume that *there's more where that came from* and you'll want to build a good track record for future requests. Of course all of the above applies to your current situation is relative to the amount of money you ask for. The rule of *the more money you ask for the more effort you have to put into it* is usually true – with federal grants often topping the list of effort involved in writing and maintaining grants.

Getting you "feet wet"—start with your friends.

For first-time grant writers I recommend pursuing your easiest prospect first. A success or two under your belt will build your confidence; being told “no” is a blow to anyone's ego. Is there someone you know in the community associated with a foundation or corporation that gives annually to worthy causes? If you think about it hard enough you'll usually come up with a name or two. For example, there are many companies that are more likely to contribute to organizations that their employees are interested in. Is there a member of the local astronomical society that works for a company that gives money to charities, non-profit organizations, or schools? Are they willing to become a part of your program, write you a letter of support, or make a phone call to someone in their company associated with the corporate giving program? Would they be willing to introduce you to their development department or board so that you can cultivate a relationship with this company and familiarize them with your program better?

Good times and bad times.

Above all else keep in mind that mixed in with your successes will be a few rejections – don't get discouraged *when* it happens -- and it happens to all of us. Try to find out what element of your fundraising effort failed. It may turn out to be something you can fix so that you can submit your grant again or it may be best to move on to other more promising possibilities. Or your timing may have been off and the company will have more to give next year. Or you may have made a mistake in your research and this foundation or company currently does not have an interest in programs like yours. In the end it all comes back to *people giving to people* – making that personal contact will make your proposal stand out from the crowd as coming from a person with a good reputation that takes the time and has the commitment (or persistence) to do it right.

This article is not meant to be an all-inclusive treatment of fundraising, but rather an introduction to the exciting and challenging process of garnering support for your planetarium and science education programs. If you find your interest piqued and you want to find out more about the fine art of grantsmanship, there are many good books with additional *tips* from successful fundraisers. I'd like wish you luck in your endeavors to fundraise and leave you with these two thoughts: *you won't get it if you don't ask and people give to people.*

Editor's Note: Prior to working with the Clark Foundation, Sheri Trbovich had over 21 years experience with the Hansen Planetarium in Salt Lake City, involved with literally every aspect of planetarium production, operations, and fund raising. Her current work with the Clark Foundation involves securing grants for science education projects around the state of Utah.

* * *