

*Your Mission is Our Mission. Our Team is Your Team.*

ADVANCEMENT OUTREACH GUIDELINES

This guideline was created to help our [Painless Prospecting](http://blackfoxphilanthropy.com/wp-content/uploads/2019/02/BFP-Painless-Prospecting-2019.pdf) clients confidently and knowledgeably initiate contact with new funding prospects; however, we recognize a guideline like this can help other development professionals in the sector. An emphasis here is on making inroads when you have no insider connections; however, the same principles can apply with warmer leads. The guideline will review the main Advancement Outreach Guidelines that the Black Fox Team utilizes on behalf of clients in our Advancement Outreach service. We hope that you find it helpful, and as always, are open to your feedback!

TIP 1: If a phone number is listed, unless the funder explicitly states, “no phone calls,” ALWAYS CALL.

A primary rule in fundraising is that: If you want to communicate, email; if you want to move something forward, call. While an email can feel less intimidating, a phone call allows you to make a human connection. There is a saying in fundraising: People don’t give to causes, they give to people. What do you do if you don’t have any contacts? You make that connection yourself. A good phone call can make all the difference. If no number but an email address is listed, your email should always include a request to speak further on the telephone.

TIP 2: If there is no getting around needing to initiative via email due to explicit instructions, we recommend the following protocol:

* + Email with compelling opener, and stating materials on the way, “…delighted to discover you are as passionate about \_\_\_\_ as we are. Sending you more information via snail mail that highlights how our core missions dovetail….”
  + Mail letter with collateral, include handwritten note.
  + Follow up call to collateral, engaging them in a funder-centric way (having done your homework)
  + After conversation, send them something of interest that ties into the conversation you had, but not about your org - a thoughtful article about the issue area you both care about or something else. No ask in this communication, just a “thought of you…”
  + Professional Persistence.

TIP 3: Always do your homework.

The more you have researched their interests and past and current funding - both organizations and amounts - the better equipped you are to make a real connection and engage them by having funder-centric conversations. If they give money to an organization that does similar work to yours, ALWAYS be respectful of that organization (they do great work!) but emphasize what sets you apart. Feel free to point out that they fund similar organizations and share your thoughts about how the nuanced differences between you help align you to the funder’s interests. “What sets us apart from other worthy organizations you support is \_\_\_\_\_\_\_\_. Why that could be a game changer is for solving this issue is \_\_\_\_\_\_\_\_\_\_\_\_.”

Homework also includes knowing as much as you can about the individual with whom you are speaking. Knowing where they’ve worked before, having read articles they’ve published, or the topic of their PhD dissertation etc. can help you refine your conversation. Even if they are not the money behind the foundation, they too have their own “hero’s journey” to working in this sector and may have a personal reason for working on behalf of the issue areas the foundation exists to solve. Connect human to human by being curious about their journey to impact; you may find you have much in common. This person is an influencer in the organization, but aside from that, it is affirming to talk with kindreds about something to which you both care deeply.

TIP 4: Approaching funders who say “No Unsolicited Requests”

In general, it is important to respect their wishes and move along. This is not only respectful but strategic and can free you up to pursue more optimal inroads elsewhere. That said, if you feel there is a strong fit, acknowledge that they don’t accept unsolicited proposals, and ask via email what it would need to look like for them to skim something that may hit a bullseye with their priority of fulfilling their mission of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. A softer approach like this will generally not burn bridges in the future if you find a connection to the organization that is warm.

If you will be at a convening together, reach out with a message to the effect of: “It would be wonderful to meet a kindred at Skoll who cares as deeply about \_\_\_\_\_\_\_\_\_\_\_\_ as I do. I hope our paths cross during the week.” Then make a point of meeting them and asking for a coffee/meeting/phone call.

TIP 5: Reaching out to funder contacts who say “No Unsolicited Requests”

If you do reach out to an email address or phone number listed on their website, it is very important that you don’t request funding. You are not requesting funding. In fact, you should mention that you KNOW they don’t accept unsolicited requests. You must instead approach this as an introduction to your organization and wanting to learn more about if there is potential for an alliance in the future. This is purely informational. Language such as this can be helpful:

“While I know that XYZ Foundation does not accept unsolicited requests, I am struck by the synergy between your interests and our work — I was hoping to have the opportunity to tell you more about our efforts in ABC field and how it dovetails with your priority around solving X."

The return rate on this type of outreach is not great but it can occasionally lead to funding. Again, even if they respond positively, it is essential that you let them lead the conversation about funding initially. Continue to keep the conversation “informative” until the door is opened to a discussion around funding.

TIP 6: Engaging funders who allow unsolicited requests and have a set RFP (Request for Proposal), either with a deadline or open

Even with an explicitly stated application process, see Rule #1. ALWAYS CALL (unless they say, “no phone calls”) Making that human connection, and “seeking to understand before you seek to be understood” (Covey) by learning more about their priorities and process can help push your application to the top of the pile.

Helpful language includes: “I see that you are accepting applications for a (DATE) deadline. Prior to applying, I was hoping to learn more about your process and priorities so that we can submit the strongest proposal possible. I have a short series of questions; can we set aside 20 minutes over Zoom so that we can be sure we are a fit for your core mission of solving \_\_\_\_\_\_\_\_\_\_\_\_\_\_? It will also give you a chance to get a sense of if we’re as strong a fit as I sense we are.”

TIP 7: Communicating restricted project proposals whilst finding where you fit in their criteria

If the proposal would be for a restricted project, rather than general operating expenses, use a call to let THEM GUIDE YOU about what aspect of your programming might be the best fit. Come to the conversation with your own ideas, but always inquire whether they agree that that aspect of your programming is the best fit, and keep the conversation open enough to share other areas of programming in case they think there is a better fit.

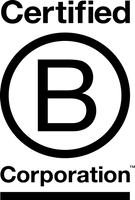
TIP 8: Funders who allow unsolicited requests, but no RFP or application process listed

Use the fact that no application process is listed as your excuse to follow Rule #1 - ALWAYS CALL. If you get someone on the phone, don’t just inquire about the application process. Use the opportunity to engage them not only about your work, but how they arrived at that being their core issue area, their journey thus far, and their greatest successes.

After really hearing them, you can follow up with an exploratory tone: |Would it make sense for me to tell you a bit more about (YOUR ORGANIZATION), to see if there is a synergy between your mission and our work? At the end of that conversation, we can decide together if it makes sense for us to apply for funding.”

NOTE: We honor the brain-trust and experience of our valued clients. If you have had successes using methods not outlined here, feel free to share via comments to this blog or directly with Black Fox Philanthropy to disseminate so what we can support organizations as well as possible in the future.

About Black Fox Philanthropy

[Black Fox Philanthropy](http://blackfoxphilanthropy.com/) is a boutique firm building capacity and fundraising strength for international non-profits and community change-makers around the world. Our mission is to help clients mobilize financial resources so they can solve complex problems on a global scale. Black Fox Philanthropy is proud to be a Colorado-based company that is both woman-owned and a certified B Corporation