

Recovery Partners of Vermont

Fundraising and Grant Writing: Matching and Building Relationships with Funders

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How confident do you feel fundraising and grant writing? Tell us here!



Scan the QR code with your device's camera OR type in https://bit.ly/44UHzRL



Recovery Partners of Vermont

Learning Objectives:

- Identify funders who are a good match for your needs
- Appraise initial contact emails and letters of interest for quality
- Exemplify what a good relationship with a funder looks like





The similarities & differences between fundraising and grants

Fundraising

- building a relationship investigate potential sponsors/donations in advance proof of 501c3 online applications

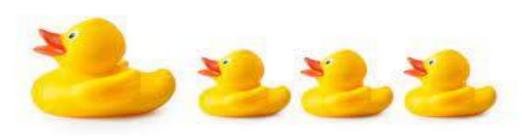
- does not require data requires cold calling it's a form of solicit<u>a</u>tion
- ۲
- personality type outgoing, talkative, friendly smaller pots of money events (ie: auctions, benefit dinners, charity walks/runs etc...) ullet

Grants

- building a relationship
- investigate funders in advance
- proof of 501c3
- online applications
- requires data
- requires stories and storytelling
- personality type detail oriented, ok spending a lot of time working alone, skilled writer
- larger pots of money
- additional documentation requirements
- requires more research on the potential funders

Getting your ducks in a row

- letterhead
- documentation (501c3, W9, budgets, board members, EIN, 990, any visual support for your work)
- organization description & history
- statements on Diversity Equity & Inclusion, environmental sustainability, equal opportunity, opportunities for volunteers
- gather and summarize relevant data
- gather stories (guests, staff, community)
- other supporters (monetary, physical donations, letters of support)
- collaborators





How to build and sustain relationships with funders

- contact information (emails, phone numbers, names, addresses)
- being aware of opportunities for networking in your daily life
- always go to the top of the chain of command if you can
 - start with a phone call
 - then an email/application
 - follow-up (fundraising: monthly basis, grants: if it's past the expected response time)
- after the yes:

 \bigcirc

- fundraising: formal thank you letter (mail or in person <u>never</u> email) with your business card, don't approach again for more funds in the same year unless the event is recurring, encourage to sign up for newsletter/follow on social media
- grants: sign the acceptance document, track how the grant is spent,
 assess impact of the grant, may or may not need to do a final report to
- the funder



Finding and Recording funders

- web search specific to your area you are targeting
 - sponsors by specialty (ie lawyers, banks, hospitals, real estate agents etc..)
 - events or physical donation by theme (ie vacuum cleaners, jewelry, gift certificates etc...)
 - skills (such as comedians, artists, carpenters, etc...)
- always document conversations
- spreadsheet of every potential funder and conversation color coded for potential success





Example of Tracking Networking

AB	с	D	E	
Date = Bussiness =	Address -	Phone =	E-mail =	Notes
DO NOT CALL BACK	GOT IT	Conference	ADD TO NEWSLETTER	Potential Physical Donations
4/18/23 102.7 WEQX	Manchester, VT	(802)362-4800		L/M, 3/14, Mimi Brown called back and
5/10/23 800Response	South Burlington, VT	(800)639-7253		L/M for Jeanne Landau in Marketing
4/18/23 802 Credit Union	South Burlington, VT	(802)862-8184		L/M
4/18/23 96.5 FM WBTN	Bennington, VT	(802)442-6321	RG	Lee Dufresne is the general manager,
7/6/23 98 Mill	St. Johnsbury, VT	(802)424-1545		L/M and e-mailed request
4/18/23 98.9 WOKO	South Burlington, VT	(802)658-1230 X 9	lio.net	3/14,L/M for General Manager Dan Du
6/26/23 A + Auto Repair	Johnson, VT	(802)635-2954		L/M
8/29/23 A New Place	Burlington, VT	(802)862-9879 Ext:1001		Joe Domko (Executive Director) L/M, I
5/22/23 A. Cooper Mechanical Inc.	Williston, VT	(802)655-9191		L/M on General Mailbox Patty
5/10/23 Abacus Automation	Bennington, VT	(802)442-3662 X 231		L/M for Scott owner
7/10/23 Abby Huston Designs	Burlington, VT			sent message on website
5/18/23 AC Hawthorne Company	Williston, VT	(802)862-6473	n, e.com	spoke to the front desk and e-mailed in
4/18/23 Ace Hardware	Regional Contact	(802)234-9951		Gary Sprague- Regional Manager- L/N
4/18/23 Action Moving and Storage, Inc.	Colchester, VT	(802)893-1234	Constant and Const	Spoke with Carol and e-mailed him inf
4/12/23 ADA Traffic Control	Colchester, Vt	(888)800-4232	2)279-3981	Spoke with Jim Murphy and e-mailed I
4/18/23 Adams Granite Co, Inc.	Websterville, VT	(802)476-5281		Matt Dion (General Manager) L/M
4/17/23 Addiction Technology Transfer Center Network		(401)863-6656		L/M for Rosemarie Martin
4/19/23 Adecco	Bennington, VT, South Burlington, VT. Saint Albans, VT.	(802)440-8111(Cindy)	(802)527-0006 (St. Albans) (802)658-9111(S.B.) cona.com	L/M 3/14 at all three locations Spoke v
5/4/23 Advance Transit Inc.	White River Junction, VT	(802)295-1824		L/M For Trish in Marketing
5/8/23 Advanced Illumination	Rochester, VT	(802)767-3830 press 7		Press 7 for Marketing Dept. L/M
4/14/23 Adventure Recovery		(888)710-7017		L/M for Josh- Executive Director
4/18/23 AFS Wealth Management	Chester, VT	(802)875-8100		L/M Hudsen Hagland 3/10, second att
3/2/23 After Midnight Jewelers	South Burlington, VT	(802)862-3608		Does not donate unless they are the s
4/18/23 Against The Grain Gourmet	Brattleboro, VT	(802)258-3838		L/M HR 3/29, Left a message 4/18 sec
3/14/23 Agilent	Winooski, VT	(802)655-4040		L/M for Sally Frank
12/16/22 Air Gas Inc.	Williston Vt	(802)863-1151	je j	send Jeffrey Coates an e-mail and call
4/19/23 Airboss Defense	Milton, VT	(301)352-8800		3/21, spoke with Tracy at main office a
5/17/23 Aired Out VT				DJ Green message him once we know
8/24/23 AJ's Ski & Sports	Stowe, VT	(802)253-4593		L/M, will ask manger
4/18/23 Alchemist	Stowe, VT	(802)253-6708	r.com	Hallie e-mailed her info 12/16, L/M for
3/14/23 Alder & McCabe, PLC	218 Eastern Ave., P.O.Box 189, St. Johnsbury, VT. 05819	(802)748-8161		spoke with Dan McCabe will Call back
4/6/23 Aldermann's Chevrolet, Buick, GMC	Rutland, VT	(802)776-5000		L/M for Stacey Aldermann Reach out i
8/14/23 Alice & The Magician	Burlington, VT	(802)234-1218	ti la cui la cui transcom	spoke with Lindsey, they made mixer of



How to find grants



- Identify the specific need or program you are looking to fund. The grants you identify need to fund programs that match your:

 a. geographical location
 b. area of need (ie Substance Use Disorder, homelessness)
 c. target population (any specific demographics such as age, race, etc...)

 - d. timeline
- e. budget (keep in mind you can use multiple smaller grants to fund one project, some funders prefer this)
 2. Web search
- - a. example search iterations:

 alcohol use disorder grant
 alcohol use disorder grant foundation
 alcohol use disorder grant site:.org

 b. sometimes this lets you see certain parts of paid databases for free web searching gets around the paywall for a limited time, for example with Instrument
 - c. If you search google while logged in to your google account, over time it learns what results you consider relevant and will improve what you see first
- 3. Search databases (demoed on following four slides) a. will need to web search for more detail on identified potential funders



Foundation Directory

simple searches for free, must register

Foundation Directory		Upgrade now 🗸 🛛 Help 🗸 🖓 Chat 🗳
Quick Start		Find funding My FDO V Resources
Find Funding > Search Results		
	SHOWING RESULTS FOR "Rutland County (Vermont, United St	tates) 🕲 " 🗙 CLEAR ALL
Organization Name	Organization Location	Organization Type
Name of specific grantmaker or recipient	Rutland County (Vermont, United States)	Type of grantmaker or recipient
Year(s)	EIN	
2003	ID Number of Organization	SEARCH
47		

 17
 Grants
 Recipients
 84

 Grantmakers
 More Insights Lead to More Funding
 Peer Organization Profiles
 990 Tax Forms

 View Grantmakers Only
 View 990 Tax Forms Only
 View 990 Tax Forms Only

Grantmakers (17)

Learn even more about grantmakers - upgrade for full versions of the grantmaker profile.

Grantmaker	City	State	Country	Total Assets	Total Giving 😡
United Way Niagara	Poultney	VT	United States	\$3,242,815	\$1,625,913
Carris Corporation Foundation	Proctor	VT	United States	\$9,101	\$153,696
Huntington Tracy Foundation Inc	Rutland	VT	United States	\$4,085,549	\$450,500
Black Dog Foundation Inc	Danby	VT	United States	\$1,145,681	\$49,000
Adam N Maslack Charitable Corporation	Rutland	VT	United States	\$867,712	Cha



Foundation Directory *simple searches for free, must register*

 Free account lets you see 	Huntington Tracy Foundation Inc Rutland, VT, United States + Contact Info
potential grantmakers and their contact information	About ^ Background ~
,	Huntington Tracy Foundation Inc Family foundations
Cause IQ https://www.causeiq.com > Directory > Vermont	EIN LOCATION CONTACT INFORMATION 26-1548756 PO Box 886 Telephone: 8027739111 Rutland, VT 05702-0886 United States United States
Huntington Tracy Foundation Rutland, VT	
The Huntington Tracy Foundation is a private foundation located in Rutland, VT that primarily unds charitable organizations.	You then should follow
Grantmakers.io https://www.grantmakers.io > Foundation Profiles	this up with a web search for more details
HUNTINGTON TRACY FOUNDATION INC Apr 7, 2020 — Profile for HUNTINGTON TRACY FOUNDATION INC (Rutland, VT - EIN	
61548756) including grantees and board members as of 2018 tax year.	

GrantStation one of many potential paid databases

- more nuanced searching available:
 - charitable, federal, or state
 - nationwide or regional
 - areas of interest (ie substance use disorder, healthcare reform)
 - target populations (ie seniors/aging, women/girls)
 - types of support (ie capacity building, emergency fund)
 - type of grantmaker (ie corporate, foundation)
 - location of grantmaker
- save your search itself
- mark if a funder is not applicable to your organization
- save your results
- annotate your results





GrantStation search results

US Charitable	US Federal		State rnment	Canadian Charitable	Canac Govern		International Charitable	Search Tips	Search Terms
ashboard	<u>Grantmaker</u>		<u>Geographic S</u>	<u>Scope</u>	Geographic Focus			1-5 of 5 results	
<u>Save</u>	Daniels Fund		US states: Co Mexico, Utah (national)	lorado, New n, Wyoming; USA			Select	a saved search to	orun 👻
<u>Save</u>	Hearst Founda	<u>tions</u>	USA				CURRENT SEAR	CH CRITERIA	
Save	Humana Found	<u>dation</u>		orida, Kentucky, exas; USA (national)	In Kentucky, the e Louisville.	mphasis is on	This is your current criteria. <u>Learn more</u>		
<u>Save</u>	<u>The Huston Fo</u>	<u>undation</u>	US states: Pe (national); Gl	nnsylvania; USA obal	Secular Grantmak United States, with the Coatesville, PA Protestant Evange Grantmaking: the and international	h emphasis on A, area lical Christian	Geographic Sco (-) USA Areas of Intere (-) Substance Use Target Populat (-) Seniors/Aging	ost Disorder	
Save	State Justice In	stitute	USA				clear all		

GrantStation detailed info on funder - more than you can see in this screenshot!

Hearst Foundations		Visit Website	Save	2
		Member Insights	Mark as	N/A
			Print Pro	ofile
			Email Pr	ofile
The Hearst Foundations are national philanthropic resources for nonprofit organizations working in the fields of culture, education, health, and	GEOGRAPHIC SCOPE			
social services.	USA			
The Foundations identify and fund outstanding nonprofits to ensure that people of all backgrounds in the United States have the opportunity to build healthy, productive, and inspiring lives.				
	CONTACT INFORMAT	ΓΙΟΝ		
The Foundations' four main funding priorities include the following:	300 West 57th Street 26th Floor			
Education The Foundations fund educational institutions demonstrating uncommon success in preparing students to thrive in a global society. The	New York, NY 10019			
Foundations' focus is largely on higher education, but they also fund innovative models of early childhood and K-12 education, as well as professional development. Preference is given to:	hearst.ny@hearstfdn.or 212-649-3750	g		
	212-049-3730			
 higher education programs and scholarships and, on a limited basis, scholarships for post-graduate education; college access and college success programming; 	PRIMARY CONTACT			
 professional development for educators; science education programs that focus on developing career pathways in science, technology, engineering, the environment, and math; 	Donna Kalajian Lagani			
and,	Eastern Director, New Y	′ork		
programs educating the next generation of health professionals, such as nursing and mental health.	ADDITIONAL CONTAG	CT INFORMATION		
Health The Foundations assist leading regional hospitals, medical centers, and specialized medical institutions providing access to high-quality				
healthcare for low-income populations. Preference is given to:	90 New Montgomery St Suite 1212	reet		
professional development;	San Francisco, CA 94105			

- programs improving access to high-quality healthcare for low-income populations, rural populations, or veterans;
- programs developing and providing specialized care for the complex needs of elderly populations;
- · programs providing behavioral and mental health care;
- programs scaling innovative healthcare delivery systems to provide efficient, coordinated care; and,
- research, particularly related to finding new cures and treatments for prevalent diseases, such as cancer.

415-908-4500

Paul "Dino" Dinovitz Executive Director, San Francisco



GrantStation *saved funders with annotations*

<u>unsave</u> / <u>edit</u> / <u>archive</u> / <u>alerts</u> / <u>add to My Plan</u>	Peter Alfond Foundation	<u>start</u> <u>matrix</u>	Grant inquiry forms: none	 When considering major grants, the Foundation typically requires that the grantee raise matching funds from other organizations and individuals. program needs to be evidence-based principal interests in the fields of education and wellness You fill out a form to request permission to apply. 	
<u>unsave</u> / <u>edit</u> / <u>archive</u> / <u>alerts</u> / <u>add to My Plan</u>	<u>The Morris and Bessie</u> <u>Altman Foundation</u>	<u>start</u> <u>matrix</u>	None	 \$250 - \$59,000 primarily focused on Burlington area very little info online (they don't have a website) 	
<u>unsave</u> / <u>edit</u> / <u>archive</u> / <u>alerts</u> / <u>add to My Plan</u>	<u>Aura Cacia: Positive</u> <u>Change Project</u>	<u>start</u> <u>matrix</u>	Applications will be accepted from July 17 to August 31, 2023. (The 2024 application period will be available in the summer.)	 programs to help women and girls make positive change Annual overall organization budget between \$2 million - \$8 million Grant support for program will be over two-year period Organizations can apply online at: https://www.auracacia.com/positive- 	



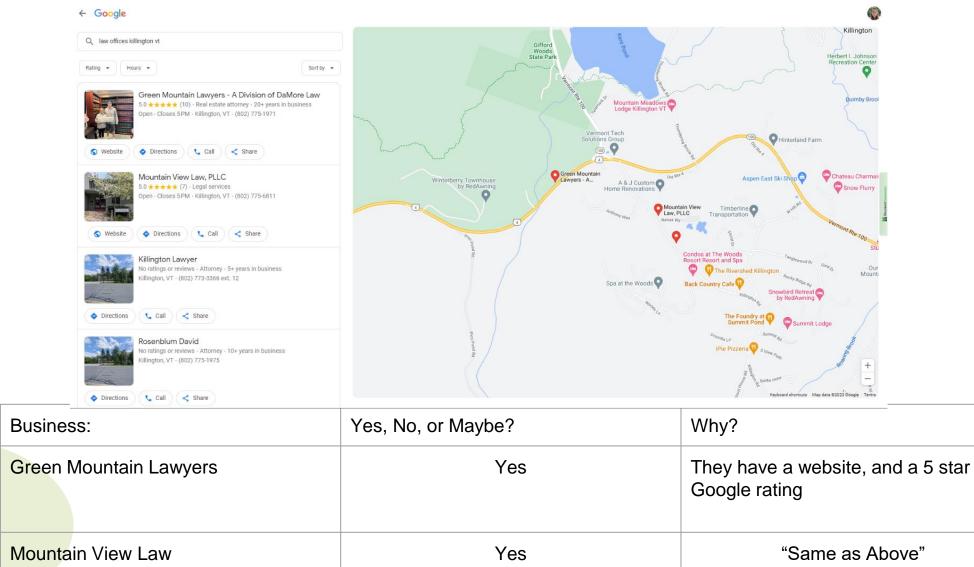
Activity 1: What's the best match for me?



Recovery Partners of Vermont

Imagine you're looking for a grant to expand a currently successful Parents in Recovery program at your recovery center in Orange County, Vermont. Ideally you would raise \$15k. You did a search on Foundation Directory and found these potential funders.

Forrest C & Frances H Lattner Foundation	Shelburne, VT	no	They do not currently give to organizations located in Vermont.
National Life Group Charitable Foundation, Inc.	Montpellier, VT	yes	They focus on children and families, as well as health and human services and prefer to fund established programs. Their geographical focus includes northern Vermont.
Oakland Foundation, Inc	Stowe, VT	maybe	Their grantmaking history indicates a preference for the environment, the arts, and services involving children. They might be interested in Parents in Recovery if they can see the connection between parents and kids.
Walter H Hayes Dr Beulah Buffum Hayes & Walter H Hayes Jr Foundation	Rutland, VT	no	While they would have been a good match, they did their final funding cycle in spring of 2023 and are closing the foundation.





Recovery Partners of Vermont "Same as Above"

No ratings and no website, they may

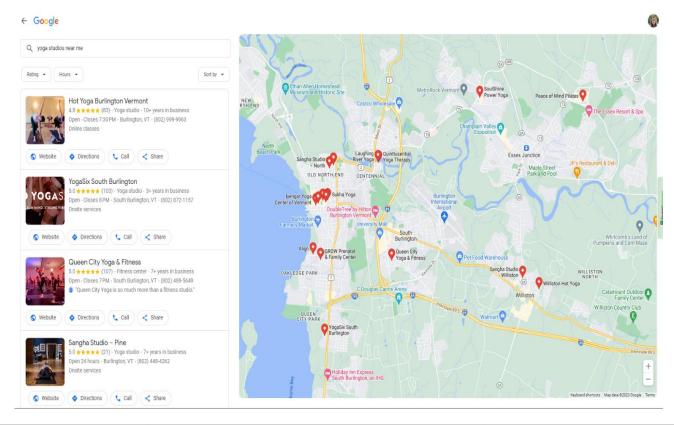
not have a lot of money

N0

No

Killington Lawyer

Rosenblum David



Business:	Yes, No or Maybe?	Why?
Hot Yoga Burlington VT	Yes	Has website and 5 star Google rating, also has been in business for longer than 5 years
YogaSix	Yes	"Same as Above"
Queen City	Yes	"Same as Above"
Sangha	Yes	"Same as Above"



Recovery Partners of Ver

Writing the initial contact email

- 1. Introduce who you are
- 2. What your organization does
- 3. Fundraising event-what, when, where
- 4. Acknowledge any attachments that may be helpful
- 5. Include your ask whether its a physical or monetary donation
- 6. Conclude with mission statement
- 7. Always ask if they have any questions
- 8. Include contact information





Letter of Interest/Inquiry (LOI)



Two ways of framing the letter - both are important to fulfill. **#1:**

- who (are you) what (are you doing) where (are you doing it) when (do you hope to do it) why (is this needed, include data AND why the funder is a good match) how (will you do it)

#2 (in this order):

- introduction (of letter writer and organization) need (include data)
- plan
- goals

and also acknowledge other sources of funding in an appropriate place

Provide just enough but not too much. Never more than 2 pages.

Caveat: Sometimes a funder provides required LOI elements/formats. In that case, follow their instructions over this guidance.



Activity 2: What's wrong with this email/letter?



Recovery Partners of Vermont

Dear Brenda and Kathy,

It was a pleasure chatting with Kathy this afternoon. We support and connect recovery organizations that provide alcohol and substance use disorder recovery support services in 12 of Vermont's 14 counties. These local, peer-run organizations provide support, sober recreation activities, a robust menu of recovery-focused meetings and workshops, volunteer opportunities, and community education helping people of all ages, genders, races, ethnicities, and cultures maintain alcohol-free and substance-free lifestyles.

We're pleased to announce we are having our 2nd Annual Recovery Is The Answer! Peer Support Is The Way! Conference. It will feature a Recovery Stars Benefit Dinner and Silent Auction, as well as opportunities for attendees to share knowledge and wisdom and celebrate the diversity of services and supports in our recovery centers and recovery community. Before our 1st annual conference last fall, Vermont had never before brought together the staff of recovery organizations from across the state. Attendees loved sharing information and learning what each recovery organization was doing. Last year's conference made us a much closer and more knowledgeable community, providing valuable support to staff doing difficult work.

We cannot do this work without the support of individuals and businesses like yours. Sponsorships are the heart and soul of this conference and all the work we do. Currently, we have 17 sponsors supporting this crucial conference event and we would love to invite you to help join our cause to help individuals and families in recovery. I can assure you that you will receive maximum exposure at the conference, press releases, and all our social marketing venues. Would you be interested in being a sponsor, donating, or attending this event?

Regards,

Marielle Stokes, Director of Development Recovery Partners of Vermont P.O. Box 3042 Burlington, VT 05408 802-777-3117 <u>marielle@vtrecoverynetwork.org</u> www.vtrecoverynetwork.org



Dear Brenda and Kathy,

Missing Intro to who I am

It was a pleasure chatting with Kathy this afternoon. Allow me to introduce myself Brenda, my name is Marielle Stokes, Director of Development, at Recovery Partners of Vermont. We are a 501(c)(3) organization based in Burlington. For over 15 years, we have provided advocacy, support, and best practice information to a network of recovery organizations across the state of Vermont. Our mission is to support and connect recovery organizations that provide alcohol and substance use disorder recovery support services in 12 of Vermont's 14 counties. These level peop run provided support, sober recreation activities, a robust menu of recovery-focused meetings and workshops, volunteer opportunities, and Missing Event What, when, where the state of the support of the substance of the substance of the substance of the substance of the support of the super of the support of the super of the super of the support of the support of the support of the super of the

We're pleased to announce we are having our 2nd Annual Recovery Is The Answer! Peer Support Is The Way! Conference. This day-and-a-half event will be at the Killington Grand Resort Hotel in Killington, VT on October 17th and 18th. It will feature a Recovery Stars Benefit Dinner and Silent Auction, as well as opportunities for attendees to share knowledge and wisdom and celebrate the diversity of services and supports in our recovery centers and recovery community. Before our 1st annual conference last fall, Vermont had never before brought together the staff of recovery organizations from across the state. Attendees loved sharing information and learning were made us a much closer and more knowledgeable community, providing valuable support to staff doing difficult work.

We cannot do this work without the support of individuals and businesses like yours. Sponsorships are the heart and soul of this conference and all the work we do. Currently, we have 17 sponsors supporting this crucial conference event and we would love to invite you to help join our cause to help individuals and families in recovery. Attached is a grid with numerous levels of sponsorships available. I can assure you that you will receive maximum exposure at the conference, press releases, and all our social marketing venues. Would you be interested in being a sponsor, donating, or attending this event?

I hope this is helpful! It might also be helpful to read our "About" page so you can see where we've been going and what our plans are. <u>About Us - Vermont Recovery Network</u> (vtrecoverynetwork.org) Missing Mission statement

Also, our vision statement is aligned well with the "theme" of the conference.

If you have any questions please don't hesitate to reach out! I look forward to hearing from you.

Regards,

Marielle Stokes, Director of Development Recovery Partners of Vermont P.O. Box 3042 Burlington, VT 05408 802-777-3117 <u>marielle@vtrecoverynetwork.org</u> <u>www.vtrecoverynetwork.org</u>



LOI - what was wrong with it?







Recovery Partners of Vermont

Missing: Why the funder is a good match

My name is Gary De Carolis, and I am the Executive Director of Recovery Partners of Vermont. We are a 501(c)(3) organization based in Burlington. For over 15 years, we have provided advocacy, support, and best practices to a network of recovery organizations across the state of Vermont. Our organization is currently seeking \$20,000 for building our capacity as we respond to a 60% membership growth. **Given your foundation's interest in health and wellness, mindfulness, and empowerment for individuals determined to help themselves in the state of Vermont, I ask you to consider a full proposal for support of this project.**

*the part in **bold** was not in your sample



Too much data

The Vermont Department of Health's data shows that we have a 6% higher rate of alcohol use and 10% higher cannabis use than the nation overall. Our opioid use is 2.67 times higher than the national average, and we have one of the highest percentages of illegal drug use in the nation. According to the University of Vermont's Center on Rural Addiction, Vermont's fatal overdoses involving both cocaine and fentanyl increased by 86.5% between 2020 and 2021. In the US in 2020, Vermont had the fifth highest age-adjusted rural opioid overdose death rate with 35.0 compared to the national rural opioid overdose death rate of 18.1 per 100,000. The Vermont Department of Health also reports that our annual opioid overdose rate increased 10% between 2021 and 2022, and alcohol-attributable deaths increased by 36% between 2017 and 2021. Substance Abuse and Mental Health Services Administration indicates that peer supported recovery has a range of Administration indicates that peer supported recovery has a range of benefits including reduced relapse and re-hospitalization rates, reduced substance use, and greater housing stability.

*the part in **bold** should be deleted

Give just enough to highlight the problem but not overwhelm the streader. Also include data showing that what we do helps!



Missing the why: why did our operating costs increase?

In just one year, our membership has grown by 60% (10 members in July 2022 to 16 members in July 2023). Our expected operating costs are based partially on the size of our membership as more members means more expenditures from us to support them and their work. Thus, our operating costs have increased by 38% (from \$150,033 in FY22-23 to \$207,303 in FY23-24). While we cut costs where we could, the extra services required for such an increase in membership means that we need to increase our budget for staff and consultants to continue to provide services to our recovery organization members to the same high standard that led to this increase in membership to begin with. This capacity increase requires an additional \$57,270, split evenly between our staff and our consultants.

*This whole paragraph was missing from the example! Funders need to know why you have this new (or ongoing) need for funding.



It's not on official letterhead!

LOI's should **always** be on official letterhead.

The only exception to this rule is if the funder makes you copy/paste your letter into an online form.





See the full exemplary LOI here:



Scan the QR code with your device's camera OR type in https://bit.ly/3rGZ36M



Recovery Partners of Vermont





Recovery Partners of Vermont



Now how confident you feel fundraising and grant writing? Tell us here!



Scan the QR code with your device's camera OR type in https://bit.ly/48iNR0u

Also give us your contact info for the slides!

