How to Cultivate Meaningful Relationships with Funders | Summary of Tips

Research the Funder and Their Interests

Demonstrate that you’ve done your homework and that they are the right fit by answering:

- Does my organization align with their areas of interest?
- Does my organization meet their funding requirements?
- What are my reasons for contacting this funder? (funding? information? connections?)
- Who do I know there? (Key names, staff or board members, issue-based leaders)
  - Can I use them as a reference or "name drop"?

Initiate a Connection

- First and foremost, drop the act and be yourself!
- Respect the ways and means an organization wants to be contacted. If they care, their website will say it.
- Assess your network and find a mutual contact to introduce you.
- Employ opportunities to introduce yourself in person.
- Prepare a thoughtful e-mail or phone call to get acquainted.
- Prepare your elevator pitch—a catered one—that talks about ideals and frameworks that will resonate with the funder.
- Respect and care for the gatekeepers; they’re people too!
- Never just "show up" at their door.

Maintain and Cultivate the Relationship

- Arrange for a follow-up conversation. Give them a reason to respond and connect, where possible!
- Demonstrate maturity regardless of the decision. Take “No” as an answer, it’s okay! Convert “No’s” into opportunities in the future.
- Express sincerity in your "Thank You’s" A handwritten note goes a long way.
- Separate facts and feelings when you and a funder disagree. Do not let them walk all over you, but don’t engage in argumentative behavior either.
- Acknowledge their ideas and suggestions, and ask if you can think it over first before automatically agreeing.

Know the who, what, when, where, and why’s in the relationship:

- Who in your organization handles follow-up/cultivation, who holds the relationship, and who is your main contact at the foundation.
- When to meet or make the “ask”
- Where to make contact (in person, e-mail, phone)
- What do you communicate
- How should you approach them on social media and at events

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Best Practices for Good Communication

**Written Communications**

- Always include your contact information.
- Thoughtfully name all attachments and don’t send a ton.
- Include links to research and data supporting your work.
- Proofread and/or have another team member re-read it for you!
- Recognize something the funder is doing in the industry.
- Present new information, not just about you and your organization, but about the world.

**Communications in a Meeting Setting**

- Confirm all appointments a week before and then the day before the meeting.
- Create an agenda, but let the funder lead the discussion.
- Demonstrate that your staff talks to one another by having a game plan for who is presenting.
- Select two good examples of your work—with a few more in your back pocket if needed—they’ll either “get it” or they won’t after two.
- Articulate what you’re looking for and present value in what you can offer: a connection, knowledge, an article, or advice.
- Generate excitement in your pitch and keep it brief; don’t overstay your welcome but don’t pass up the chance to stay, if invited!
- Demonstrate your rationale and awareness of other organizations in your field. You are not the only organization that provides this service/program.
- Summarize details in a follow-up email; no one wants a mountain of paper and materials forced on them!

**Face-to-Face Communications**

- Actively listen, ask smart questions, and get to the point!
- Make and maintain eye contact.
- Conversations are two-way streets; let them speak too!
- Let silence speak… to leave room for questions.
- Answer questions precisely, and use their comments and questions to go into topics you want to cover.
Use this worksheet to help you prepare talking points for an introductory call or other communication with a prospective donor. You can use this for a specific project or for your whole program, as we're doing here.

FIN Partner Organization description and mission

FIN Partner Organizational Values:

For example: Free access to information


For example (SkillShare): Learn new creative skills. Explore thousands of online classes in design, photography, business, and more.
Drafting Your Elevator Pitch Worksheet

Outcomes: What is different because of your work?

For example: More nonprofits learn about funding opportunities; leveling the playing field for access to philanthropic capital.

Who benefits from your work?

For example: Local nonprofit professionals, community leaders, aspiring social change agents

Leadership and organizational capacity to implement the program

For example: Program director has over 20 years building the capacity of local nonprofits.

(Once you have a funder in mind) Describe why this is a match

For example: Shared interest in building the capacity of the local nonprofit sector to be more effective.
Drafting Your Elevator Pitch Worksheet

Draft opening statement/Elevator Pitch

For example: Foundation Center connects nonprofit professionals and aspiring leaders to the knowledge tools and training they need to make a difference.

Do you have a minute to talk about how we can work together to strengthen local nonprofits?

Example Opening Statement, for a specific project:

{Calling the program officer in charge of grantmaking related to employment.}

“...Because of the XYZ Foundation’s focus on workforce development, I wanted to let you know about a new project which we think is a very good match with your employment program. Under our “Jobs for Life” project, $75,000 will ensure that 100 young adults build their skills and become more self-sufficient. Would it be possible for me to tell you more about it?”
Introducing Mary!

What we know about her:
- Program Associate at mid-sized foundation
- Lives and works in Minneapolis-St. Paul Metro area
- 32 years old
- Been with foundation for 3 years

Let’s complete her persona now—use your imagination to fill in the blanks. You can base your answers on a real person or try some creative guesswork!

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