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
Best Practices for Good Communication

- 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.
- Identify who you are, how you found them, and why you want to connect.
- Practice brevity; and be clear and concise.
- Treat them as the humans that they are; be thoughtful and engaging with non-committal conversation.
- 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!
- 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.

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.
- Identify who you are, how you found them, and why you want to connect.
- Practice brevity; and be clear and concise.
- Treat them as the humans that they are; be thoughtful and engaging with non-committal conversation.

Communications in a Meeting Setting

- 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.
- 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!
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Face-to-Face Communications

- 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.
- Identify who you are, how you found them, and why you want to connect.
- Practice brevity; and be clear and concise.
- Treat them as the humans that they are; be thoughtful and engaging with non-committal conversation.
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