How to Cultivate Meaningful Relationships with Funders | **Summary of Tips**

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TRAINING
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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"?

RESEARCH
FIND THE FIT
THEN CONNECT

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.**

USE YOUR NETWORK

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**

- 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.

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.