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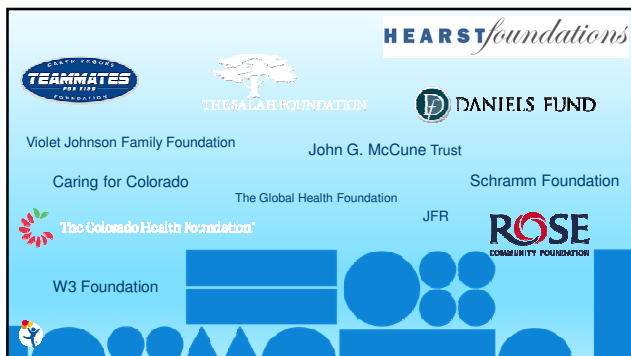
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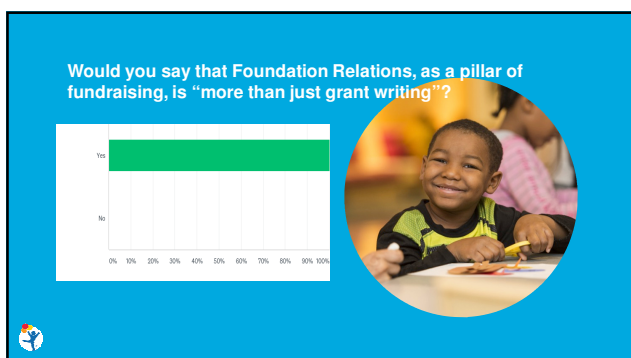
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**...is this more than just grant writing??**

Foundations view grants as investments that require proof of performance.

Establishing a personal dynamic relationship helps to expedite the evolution of the program in need.

There must be more than just a paper relationship to develop trust and honest communication.

Contact is more important the grant writing.

Foundation relations encompasses open and honest two-way conversations before a grant request is submitted, during the foundation due diligence process, and throughout the term of the grant.

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### What we do

- Inform ourselves
- Inform others
- Conviction of thought
- Clarity of words
- Transparency of outcomes
- Responsible for relationship
- Teammate to the program staff

## CONNECT THE DOTS




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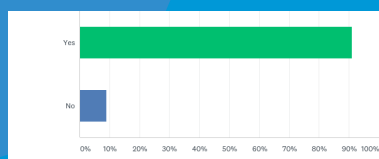
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Are you willing to speak with a fundraiser/organization representative before an application is submitted? (ie - will you vet a proposal concept?)




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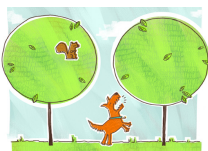
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This is actually mandatory as we are private invitation only and pre-vet the grant applicants and grant programs prior to grant submittal.

**Absolutely. This is actually critical. We don't want prospective grant seekers barking up the wrong tree.**

I would prefer to speak with someone before seeing a written application. In my mind, the written application is the formality at the end of the process.




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Actually prefer to talk about an application before it is submitted

Yes...but...We do not want fundraisers to waste their time applying if their project is not eligible, but PLEASE do not waste our time by calling to discuss something that is obviously covered in our guidelines (i.e. Guidelines: the Foundation supports scholarships for students. "Our institution has need for scholarships, would your foundation be interested?")

I think this is a really important function for foundations. No sense in not being transparent and accessible. This is all a part of building a relationship, making good investments and helping non-profits operate efficiently.

Speaking and personally meeting with every fundraising director is essential in our foundation relationships.




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### How do you prefer to be contacted?

We have annual accountability reporting and like to have light engagement with our partners.


Don't recommend postal/mail

Again, review the guidelines to determine how a funder prefers to be contacted - or not.

I prefer a brief overview email paragraph first, then a phone call.

Phone or email are perfect.

First email to set up a call or meeting to talk.




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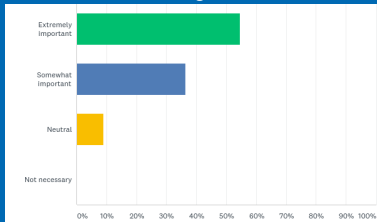
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### To what degree is personally knowing the organization (and its leadership) valuable toward your (Board's) decision to consider and/or make a gift, or not?



Degree of Importance	Percentage
Extremely important	~55%
Somewhat important	~35%
Neutral	~10%
Not necessary	0%




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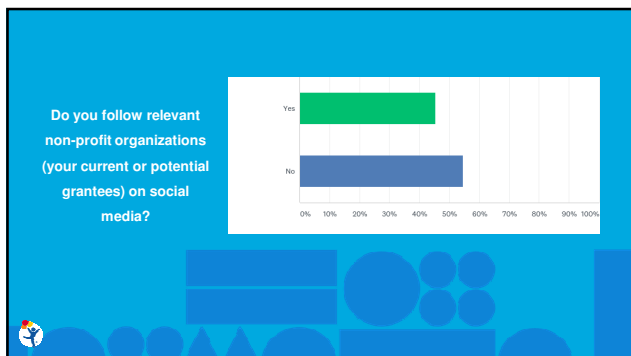
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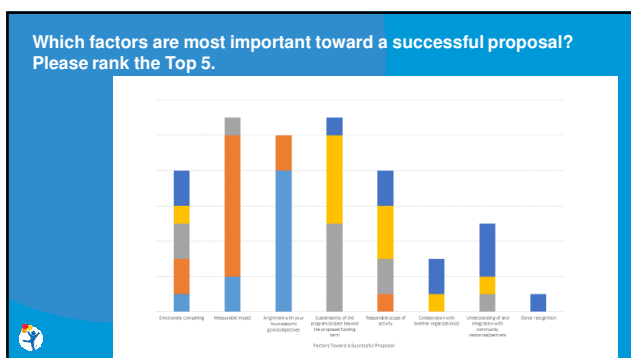
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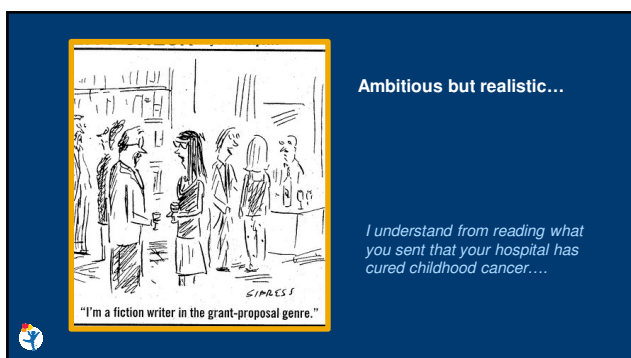
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## How do you define “effective stewardship”?

Communication and updates on the outcomes of our grant investment...along with remembering the grant sponsor's name.

Stewardship involves the accountability of handling the donation with care. An effective steward manages the project and keeps the foundation updated.

Keeping us in the loop on developments. Sharing exciting news so we can champion their work internally and externally. Meeting reporting deadlines.

Using the gift as outlined in the grant contract.

After a gift is given, it is reasonable and expected to receive a timely acknowledgement with the required information.

Responsive to our request for any follow up information, and thorough, detailed reporting submitted on time. Understanding of our limits to fund again.




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Engaged relationship with open communication.

Does the organization manage its money well and is the money spent for its intended purpose?

Effective communication re. impact of gift is of course key, as is genuine messaging re. appreciation and connecting donors with end users/recipients of services.

Ensuring that the grant funds are used in accordance with the letter of agreement and if any potential deviations come up, communication with the foundation is handled in a timely manner on the front end.

Inquiring as to the status and impact of the grant without demanding too much detail as to put an administrative burden on the organization.




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## That's our job!

- Manage relationship
- Resource to the programmatic team
- Stay true to the contract
- ...not just a Grant Writer!




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**Name 3-5 characteristics of an ideal foundation relations professional (what qualities of a grant-seeker will best interface with you, a Program Officer?).**

High touch but not intrusive. Respectful of grant outcomes. Keeping the foundation's privacy.

Organized, informative, personable, sense of humor, warm personality, and devoted to their career/cause.

Confident - Realistic -Transparent - Good fiscal steward - Passion for their work -Integrity -Strong Communication Skills -Strategic

1. Knowledgeable about the area being gifted to (or can quickly get the information requested)
2. Quick response times to any questions/requests
3. Truthfulness in what donations are being allocated to - especially if it has been specified.




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Knowledgeable Good listener Detail-oriented Responsive

Authenticity, honesty, knowledge of when to represent an idea and when to bring in an expert to explain/enhance the pitch (we don't always want to chat with foundation relations professionals and the really good FRP know when to bring in a SME - which is not always at the start of the conversation).

Honesty, timeliness, friendly and passion for the ask

Gifted fundraisers make it look easy. The relationships they build are genuine and it's obvious when they love the work they do and develop long-term relationships with potential funders regardless of the size of the organization or grant request.

Resourceful (can navigate your organization to find answers Prompt (often we ask for last minute information) Direct (straight shooters)

Open and honest, not too aggressive, and knowledgeable about the organization.




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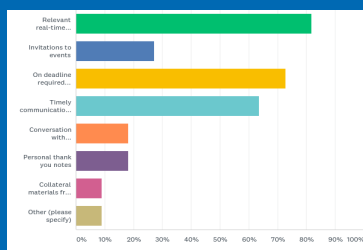
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What ongoing information/communication is most valuable to you? (Select Top 3)




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Can you share, in just a sentence or two, the biggest mistake(s) a fundraising professional or organization has made (or could make) with you/your Foundation? (ie – tell us what annoys you, or what is a dealbreaker or about a “last-dance”)

When there is turnover in the ED or Development Role, there is rarely a transition of the relationship which is incredibly annoying and a huge black mark for the organization.

Too much solicitation....However this has never been a part of our experience.

They forgot to publicly acknowledge us when announcing a major partnership that we built for them.

Doesn't listen or acknowledge when proposed program is not aligned with Foundation goals/objectives; pushy -Doesn't effectively communicate

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Frequent calls or emails that do not further the process - please recognize that we have many other ongoing relationships and time is precious. Our foundation is an institution and cultivating me as an individual does not help.

Requiring hand-holding through the application process. Please read the instructions.

"Fishing" - again, read our guidelines and only contact us with clarifying questions.

Failure to report.

Believe it or not, I've had to call an org to see if they got our money because they NEVER said Thank you!

Failure to simply submit within a short time once contact has been made and an invitation extended.

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Spell the organizations name and trustees name correctly; spell the organizations name correctly

Not following grant instructions and/or restrictions, disingenuous communication/outreach attempts, lack of proper follow-up.

I appreciate open and honest communication. When organizations or representatives are not forthcoming with information or "tell you what you want to hear," it makes for a difficult relationship.

If an organization fails to follow up, they will likely just fall off the radar. It is a **balancing act** ensuring that the professional or organization isn't too pushy or expecting too much, but the lack of any follow up results in a fading relationship with the organization itself.




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We have had an organization use money that we've allocated for one thing, be used for something completely different. We didn't realize this until we received their annual report (including financials), and addressed this with them. This same organization changed their mission without informing us, as donors. They no longer aligned with our mission and we didn't like the way this was handled. These were both deal-breakers and we no longer work with them.

Assuming that the organization will always be funded because of reputation/networked status/prior funding; demeaning other partners to position itself as better; arguing over a declination after a rationale has been provided (it's one thing to gently push back, share additional info, ask for feedback, etc. It's another thing to argue with a PO).

Do not spend the money for a different project.




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Nobody's Perfekt...but we shall be honest, always!

- I am checking in on the report you owe us.
- I haven't heard from you all year...?
- Our contract agrees to 500, but your report says you will complete only 250.

**Making  
mistakes is  
better than  
faking  
perfections.**




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**Can you share, in just a sentence or two, the most impressive/memorable move a fundraising professional or organization has made with you/your Foundation toward solidifying a trusting and mutually respectful partnership? (ie – tell us a way that someone/someplace blew your socks off)**

We were thinking of donating to an organization and we were deciding between two areas. When I asked for specific information on what was included in both projects, my contact sent me the specific information I was looking for within 48 hours. When I went back with questions, I received answers within 24 hours. To me, this showed that she was really wanting our donation and did what she needed to in order to stand out above most other organizations.

The timeliness of the gift acknowledgement was also quite impressive.

Doing the homework and ready to go with a proposal or site visit when requested.




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Impact Hour presenting to the foundation instead of writing a report.

Our fundraising professional is very respectful, gentle and well mannered. She consistently educates us in a compelling way; and truly loves what she does.

For my work internationally, we put together coffee table photo books and a canvas print of a clinic that partners rave about as they can't all travel to where our work takes place. And it is a source of pride in their investment and two things they can share with family and friends.

Highly strategic professional who was able to easily communicate the goals of their organization and also help their organization leaders understand the goals of the Foundation--- effective communicator, honest, diligent and again strategic....




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Not really - I thinking a trusted, long-term partnership just takes time and investment on both sides.

It is great when the intended effect is exceeded. An organization wants to feel its money is well spent.

I always appreciate it when organizations approach me with potential conflicts with the terms of the grant proposal as soon as they come up. I'd rather know before a problem has happened versus finding out after the fact.

Someone who is knowledgeable, creative, thoughtful and interested in understanding the foundation's unique perspective demonstrates they are a respectful partner.




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