



12 KEYS TO BUILDING A SUCCESSFUL RELATIONSHIP WITH GRANTMAKERS

1. Do your homework first: Be sure you are informed before you talk to a representative. This may be a one-time opportunity to have a discussion and ask questions. Review their web site, and also check the listing of staff and board members, is there a link-up with someone from your organization?

2. Reaching out: Personal contact is *the* key to building relationships. Do your best to make direct contact. Don't rely on email messages! A telephone conversation is the beginning of building a long-term relationship and if you can schedule an in-person meeting or site visit from the conversation, that is ideal.

3. Leverage your key stakeholders: Be sure your board members, staff and volunteers feel confident and can skillfully represent your organization with key messages. They should be informed as to current priorities, goals, and fundraising activities and be able to describe the agency with clarity. They should also be prepared with extending next steps; how to invite a potential donor to learn more about the organization. If you haven't done so, consider bringing in a consultant to train your group. This can be a very worthwhile investment.

4. Site visits: Strategize the kinds of opportunities your organization offers for a meaningful site visit. Plan this before talking to potential grantmakers, then be prepared to invite them to visit a meeting, event or other opportunity where they can witness your mission at work.

5. Community Events: Stay informed of events grantmakers may attend and plan to personally attend or send key representatives from your organization. This may include conferences, receptions sponsored by your local community foundation, etc. Use these events to introduce yourself, let them know you are familiar with their foundation, and be ready to explain your work in the form of an "elevator speech" i.e. 3 minutes or less. This is a great way to introduce your organization to foundations who give on an 'invitation only' basis.

6. Education & Peer Resources: It can be very helpful to attend training sessions and join professional round table discussions or other events where you can network with other grant seekers. Also, internet groups and Linked In can be great resources. These will assist you in staying current with trends, identifying new prospects, as well as providing venues for posting questions.

7. Invitations to your special events – be sure to include potential and current grantmakers on invitation lists for your special events. Include handwritten notes if at all possible. These are all opportunities to build personal relationships. Follow up with a personal call; did they see invite, are they able to attend, explain objectives of the event and/or check in post-event and inform them of outcomes.

8. Got the gift? Once you have received a gift, this is no time to drop the relationship-building process. Remember these are investors in your organization. Develop a plan to regularly connect with your grantmakers and major donors to keep them informed of your activities, learn more about them, and share your good news. Always remember to appreciate funders for their gift and to be specific about what it has done/is doing for the agency.

9. The annual donor recognition reception: Create an annual event to appreciate donors and invite prospects. This is also a great opportunity to invite donors you've identified for a possible upgrade, such as donors who are not at major levels, but are loyal over many years. This event should be inspiring, with a presentation that illustrates your mission in action.

10. The rejection letter: This may be your first opportunity to make personal contact with the grantmaker. Use the letter to contact the grantmaker and have a conversation about why you were turned down. Get specifics and use this time to explore ways your work may still be a fit. Find out what their long-range plans are.

11. No doesn't mean Never: Keep checking back with grantmakers, people and criteria change. With large public foundations, continue to work towards a site visit.

12. Take advantage of technology: Email announcements, e-letters, blogs, posting an inspiring video on your website or facebook or similar sites, are all ways to continue to inform grantmakers of who you are, and what you are doing. These methods do not take the place of a personal relationship, but build towards it.

Contact Louise Franklin 415-717-3702, www.louisefranklin.com for more tips on creating a successful development strategy for your organization or visit www.thenonprofitedge.com