

# Navigating Institutional Philanthropy: How to build relationships with funders

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# Question

What do you want to know?

When I leave this session, I will have  
learned...

# Principles to Keep in Mind Throughout the Process

- The Goal
  - = people become advocates and champions of your cause and organization
  - = the relationship becomes a partnership that is more than grant dollars
- Be authentic and transparent
- Demonstrate thoughtfulness
- Be communicative – talking and listening
- Respectful push back is completely appropriate



# Before the Grant Proposal Phase

- Read as much as you can about the funder before applying
  - Who else have they funded? Know similarities and differences between you and them.
- Try to schedule an informational meeting
  - Have questions that help you a) gain information about “fit” and b) inform what to include in a proposal
  - Be ready with your “elevator pitch”

# During the Grant Proposal Phase

- Your job is to help the Program Officer do their job = making the case for why your organization should get the grant over someone else
- You are the expert, at the same time...
- This doesn't mean you need to know everything and have everything figured out
- The work is hard, we know this
- We are looking for transparency, thoughtfulness and open dialogue/communication
- We are partners



# During the Grant Proposal Phase II

- Do's
  - Follow instructions and deadlines carefully
  - Re-read your proposal (caution: copying & pasting)
  - Check your math
  - Know the laws (and don't violate them)
  - Show that you listened if we spoke beforehand
- And Don'ts
  - Bury the lead
  - Make hyperbolic statements
  - Confuse outputs with outcomes
  - Sustainability does not equal more grantwriting

# During the Grantee/Grantor Partnership (and About That “No”)

- Tending the funder relationship can help shift from an accountability to a partnership frame
- Communication still matters
  - Don’t avoid your funder when trouble strikes
  - Be proactive (about opportunities & needs)
  - Provide periodic updates and event invitations
- Don’t miss those renewal or grant report deadlines
- There are millions of good ideas so keep in mind a “no” isn’t a “no” forever
- When you do get a no, solicit feedback about why not, and listen to it

Questions?

**Thank YOU!!**