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!!