

Cultivation Primer

Building Relationships to Win More Grants

Review of the roles/responsibilities of executive leadership, making “best matches” with appropriate grant makers, making cold calls, on-site visits, submission methods, dealing with rejection, stewarding grant awards, and nurturing grant maker relationships.

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Introduction

Successful Proposal Development: Why Cultivation is Key

One of the most important, yet often overlooked, components of successful proposal development is cultivation. Developing and implementing cultivation processes that complement your grant seeking efforts will increase your fundraising success. Your proposal is more likely to be considered or awarded when you have invested time and effort to *establish a meaningful relationship* with the grant maker. Cultivation has become even more critical to grant seekers in recent years. The recent economic recession has produced a higher demand for many services provided by nonprofit organizations and has contributed to the creation of a funding environment that is increasingly competitive. This primer will serve as a guide for cultivating relationships with prospective funders that will support and enhance grant seeking activities.

Cultivation efforts need to be: 1) strategic, 2) systematic, and 3) coordinated.

- *Strategic*—plan in advance and design to meet goals presented in your organization’s strategic planning documents, including your overall development plan
- *Systematic*—integrate elements of grant seeking, marketing/communications, and general development/philanthropy techniques
- *Coordinated*—the cultivation activities of an organization will more than likely involve multiple key staff members. Those staff members must work in synch with each other when executing cultivation activities to avoid duplicity or leaving a negative impression with prospective funders. Developing a cultivation strategy, having clearly defined roles and responsibilities, and having processes in place to track your cultivation strategies will help everyone on your team work in synch.

What is Cultivation?

Cultivation is the process of building trust and loyalty to develop relationships with prospective funders. It is also an opportunity for you to talk to about why your organization is different. This is accomplished by communicating with prospective funders so that they understand the mission of your organization and what services you provide, by demonstrating that your organization is financially responsible, and by expressing appreciation for their interest and support. To fully appreciate what cultivation is, it is useful to also understand what it is not.

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<i>Cultivation is NOT...</i>	<i>Cultivation IS...</i>
targeting wealthy prospective donors to get a big gift or long-term financial support.	identifying prospective donors who might have a vested interest in the work that your organization does.
about engaging prospective donors only when you need financial support.	engaging prospective donors to elicit interest in your organization.
about making frequent requests and trying to get as much support as you can from a donor.	communicating with a prospective donor about problems they are concerned about and identifying ways that they can be involved in the supporting solutions.
a process that ends after you receive a large gift and send a thank-you letter.	continuous communication with donors to inform them about issues they care about, telling them how their support makes a difference, and inviting them to see, firsthand, what their donation is doing for the people you serve.
treating donors like a checkbook.	building relationships with donors and treating them like close friends of your organization.

Based on the article, Donor Cultivation: What It Is and What It Is Not by Kim Klein, Grassroots Fundraising Journal, 1999.

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Roles & Responsibilities

Whose responsibility is it to cultivate?

Board

When it comes to cultivation, an organization's board members should act as an extension of the organization—as ambassadors who “spread the good word” about your organization's work. It is critical for board members to actively engage community and business leaders, join professional or social organizations, and be prepared to give the elevator speech at any networking event. Acting as a representative of the organization at all times, a board member should remember the five Ws:

- Who they are talking to
- What the current organizational needs are
- Where it is or is not appropriate to discuss the organization
- When it is appropriate to make an “ask”
- Why the organization is seeking support

Executive Director/President/CEO

Grant makers want and expect to hear from a member of the organization's executive leadership. If an executive director personally reaches out to a grant maker, it is more likely to get noticed. While that might be a more successful approach, most executive directors of nonprofit agencies do not have schedules that permit them to research funding opportunities. Working with grant management or development staff, executive directors can be more efficient and effective in their efforts to communicate with prospective supporters.

Grant Writing / Development Staff

In the cultivation process, the grant writing and development staff typically work behind the scenes to guide and advise the executive's outreach activities. Ideally, grant writing and development staff perform the research to identify prospective funders for cultivation and collect information related to giving history, areas of interest for support, award ranges, application cycles, and processes. This information can be used to provide guidance to the executive, so that he or she knows what programs to ask a prospective grant maker to support and how much support is reasonable to seek.

Outside Consultant

If a professional consultant is contracted for proposal development, it is extremely important that they work closely enough with staff, board members, or the executive director to have a solid understanding of the organizational mission, programs, needs, and services prior to any cultivation work. It is recommended that someone from the executive

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board or staff work in tandem with the consultant to make sure organizational goals are met.

Organizing Your Team

While the executive director and the grant writer have distinctly different roles and functions related to cultivation, it is crucial that they work in synch to maximize their organization's cultivation opportunities and be successful in securing grant funds.

We recommend a two-step, systematic approach to help coordinate your team's cultivation efforts. The first step is to develop a grant seeking strategy that targets well-matched potential grant makers. As you research prospects, organize information about each grant maker in a spreadsheet or database, including information such as contact information for program officers, board membership, funding interests, types of support, deadlines, award ranges, and application submission guidelines. You should regularly research and update your prospect list to make sure you have the most up-to-date information available. The grant writer can and should call the foundation if s/he has questions about this general information. However, it is not the role of the grant writer to begin real cultivation—that will occur in the next step.

Once a prospect list is created, sort the content by application deadlines to generate a month-by-month list of targeted funding opportunities. This information should be shared with your executive leadership and board members, as identifying possible existing relationships between your organization and a potential funder is a critical first step in your grant maker cultivation process.

If your leadership recognizes the names of program officers or board members from one of your targets, those people with the relationships should be involved in making the first contact with the foundation. This typically involves the executive director or a board member making a phone call to the person they know. They start a conversation about the “ask” (*briefly* describe your organization, the project or program you are seeking support for, a request amount, and verify the submission process and deadline). They may schedule a meeting for lunch or invite the foundation contact to the organization's facilities for a tour (the most effective method). In some cases, the phone call is the only contact. Regardless, information gathered from these conversations should be relayed back to the grant writer and incorporated into your proposal, generally within the first one or two paragraphs (close to where you make your first “ask” statement).

By taking these steps to share information about prospective funders with your organization's leadership, you can implement an approach to grant seeking that is effective and efficient in utilizing your team's resources.

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Strategies to Keep Your Team's Cultivation Efforts in Synchrony

Maintain a Shared Calendar dedicated to logging important dates and activities such as cultivation calls, proposal deadlines, awards notification, evaluation timelines, thank you letters, etc. This will keep your team on target and up to speed with proposal development.

Develop a Grant Maker Database (your list of potential prospects) that includes foundation information, proposal guidelines, past applications or proposals, checklists, newspaper articles, and cultivation or meeting notes. Your grant writing team may change over time and it is best to be sure there is sufficient information for new team members to continue development activities.

✓ **TIP:** Use the **Grant Possibility Spreadsheet** in the Toolbox as a template for organizing your research related to potential grant makers and developing your strategy to seek support.

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Best Matches

Finding an appropriate grant maker to fund your project can be one of the most challenging steps in the cultivation process. Learning how to search for grant makers and taking the time to do the preparation work will not only save you time and resources in the long run, but it will also be recognized by grant makers. The information below can be found in the Foundation Center's National Foundation Directory online, which is a library of all private, corporate, or community foundations in the United States. Another great resource is GuideStar (www.guidestar.org), which maintains a database of nonprofit 990 forms that can be useful in the research process.

In your research of prospective funders, consider the following factors that will determine if a funder is a good match for your organization:

- a) **Geographic Coverage:** Determining what localities, states, or regions a foundation will consider for funding is the quickest way to narrow down your search. If a funder clearly states they only give to organizations in Ohio and your organization is located outside of Ohio, you should not bother to apply.
- b) **Subjects Areas:** Refers to the Areas of Interest a foundation will consider. For example, Health & Human Services, Arts, Education, Medical Research, etc.) If your organization's mission or the specific program does not fall under one of these areas, you should not pursue the grant.
- c) **Types of Grants:** Refers to the kind of project or request the foundation will consider: program, operating, capital support, etc.
- d) **Total Assets:** Total assets the foundation currently holds.
- e) **Total # grants awarded last year:** This can let you know how competitive the grant cycle will be.
- f) **Total \$ grants awarded last year:** This will allow you to gauge the average amount of funding they award so that you do not make an inappropriate request amount.
- g) **Others funded in your town or county:** Research the foundation's history of giving to organizations in your region. It is a useful tool in determining if the foundation is a good match. It is also helpful for initial cultivation as a great conversation starter and it shows you have done your homework.
- h) **Other similar projects funded:** Both g) & h) can help you to determine if similar organizations have been recently funded by the foundation and help you better determine if the organization's request is likely to be considered.

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- i) **Award Range:** The minimum or maximum request amount the grant maker will consider awarding. This may also help determine what type of support you will request.

✓ **TIP:** Use the **Prospect Worksheet** and the **Decision-making Matrix** in the Toolbox section to assist you in identifying best matches for your organization.

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What Grant Makers Want to Know About You

Before contacting or approaching a prospective grant maker, prepare to respond to some of the more common questions that grant makers will ask about your organization and/or project that you plan to ask them to support. Below is list of questions that you might be asked when you are cultivating a prospective grant maker:

- How long has your current leadership team (Executive Director, Finance Director, Operations Director, etc.) been with your organization and what is their level of expertise?
- What level of expertise do your direct service staff who will implement your project have or be required to have?
- Describe your organization's track record, both in general and specific to the proposed project? Can you provide specific examples of service-related outcomes?
- How do you measure your success or impact?
- Are the programs that you offer research- or evidence-based?
- How active is your organization's Board of Directors?
- Does your organization have a written strategic plan?

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Initial Phone Call or Request for Information Letter

The purpose of calling the funder is to not only introduce the organization to the grant maker and begin cultivation, but also to confirm the proposal submission process. It gives you the opportunity to ask any questions pertaining to specific grant proposal guidelines, submission deadlines and requirements, how to format the proposal, what the foundation wants to fund, and how much the amount of funding they will give. It is important to confirm this information because it is not uncommon for grant makers to revise proposal guidelines, shift funding priorities, or stop accepting new proposals.

Key factors to consider when approaching prospective funders:

- *Connection*—Identify the person in your agency (staff, board, volunteer) who might know the donor and can make or assist with the request.
- *Ability*—What is the right amount to ask of a donor? Research past giving history.
- *Interest*—What is a donor’s reason for giving to you? Is it personal connection or experience related to what your agency does?

Initial Phone Call: Step-by-Step

Ask for the specific grant officer listed on the foundation information sheet. Introduce yourself and state your reason for calling:

Hello, my name is (your name) and I am calling on behalf of the (organization name). We were interested in finding out more about the (foundation name & specific grant program).

Find out if the officer is familiar with the organization or project, and if not briefly state the purpose of the project to gauge interest. Confirm funding priority or state a brief mission alignment.

The (organization name) is a nonprofit organization whose mission is to help end hunger among children in (your city or state). I understand the (foundation name) supports organizations in (city/state/region) that serve underprivileged youth? We are currently working on a community garden project to feed local inner-city children, and I was wondering if that might be something you would like to know more about.

If so, proceed to confirm the application or submission process, deadline, and format. Cross reference with the information you already have.

From the information I have here, the process to apply for grant funding is to submit an application/proposal letter/letter of inquiry and the deadline is December 1st?

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Find out any additional information you are able to gather from the grant officer about the criteria, submission, or proposal evaluation process:

- *Are there specific proposal guidelines available or application forms needed? (If so, ask how to obtain them online or if they could be sent to you.)*
- *Are there any specific line items that the foundation will not support?*
- *When does the foundation board meet next to review requests?*
- *Approximately how long does the review process take and when should we expect to receive notification?*
- *Is there any additional information that we should know before submitting the proposal?*

If the officer seems interested, the foundation is a good match, and the opportunity seems promising, attempt to set up a meeting or a site visit.

- *Would you or any of the foundation trustees be interested in touring our facility? (If so, schedule a meeting.)*

Thank the officer for their time, let them know that you plan to submit within the next several weeks and that a board member or executive director will be following up with them soon.

- *Thank you for the information, your time is greatly appreciated and you should be expecting a proposal from (name of organization) within the next 30/60 days.*

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Meeting/Onsite Visit

If the grant maker is local: Once you have introduced the organization to the grant maker, you should move to the next level of cultivation and schedule a meeting or invite them to your facility. The meeting can springboard your organization from a name on a letter to a relevant and worthwhile organization in the eyes of a funder. Where to meet depends on the type of organization, what kind of services or programs you are seeking funding to support, and if your facility would enhance the grant makers understanding of what you do.

Ideally, you want to get foundation's representatives to your site to get a firsthand look at what you do. However, if a site visit is not possible, a lunch meeting or coffee with your executive and/or a board member can be equally effective if you prepare talking points, present notable information about your organization's impact, and provide the foundation representative with up-to-date materials about your organization.

Getting the right people to the table: Before you request a meeting, be certain to communicate with your board and executive staff to find out if they have any personal connections to the foundation. An inside connection may enhance your prospecting efforts and improve your likelihood for success.

What to say: Be prepared to ask and answer questions. Prepare your questions or responses in advance. Tell the trustee or officer about your organization, its mission, the services you provide, notable accomplishments, clients, and current challenges. Grant makers are well aware of the financial challenges that nonprofit organizations face, so do not make your need for funding your primary selling point. It is important to highlight and emphasize your services and how your capacity to serve will increase with more funding support. The focus of your presentation should be about how the foundation's support will help your clients, not how it will help you.

Results: Once the meeting has been scheduled, be sure to thank the officer for their time. Follow up with a confirmation call or email a week prior to the meeting. Now that you have scheduled a meeting with a foundation officer or trustee, you are one step closer to securing a grant award.

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Submission Methods

There are several types of submission methods, and it is critical that the format of your application or proposal is exactly what the grant maker is requesting. Your proposal can get discarded immediately if it is not formatted properly or as specified in the proposal guidelines. During the initial phone call you should ask the grant officer to clarify any unclear proposal formatting that you are unsure about. The most common types of submission methods are:

- Letter of Intent/ interest/ inquiry (one to two pages with ask)
- Short Proposal Letter (letter, attachments)
- Full Proposal (cover letter, proposal, attachments)
- Application (form provided / required)
- Online Application (maximum character and word limitations)
- Emailed application/proposal (in any format listed above)

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Follow up Calls/Contacts

The first step after submitting your proposal is the follow up phone call. This is a great way to stay on the radar of the foundation. The more your organization's name is in the mind of the people involved with funding decisions, the better your chances of grant approval. However, do not "pester" the organization with repeated phone calls, as this can be viewed as harassing and have a negative impact on your request. Follow up phone calls should be brief and should be made by the executive director or board president. The follow up phone call should be placed within 15-20 days of the initial submission of the proposal. This will allow ample time for the delivery of the proposal and will allow you to make sure you have all the information you require for the follow up phone call. There are three main functions of the follow up phone call:

1. ***To make sure the proposal has arrived to the foundation***—There is a chance the proposal may have gotten lost in the mail. Simply asking the foundation if they received your proposal can take a large amount of stress off of you.
2. ***To check on the current review processes of the foundation***—Each foundation you send proposals to will have a slightly different method of review. A quick ask will let you know when the board will meet, make their decisions, and how long it takes for notification.
3. ***To see if additional information is required***—Occasionally you will overlook sending vital information to the foundation to which you are applying. By asking during the follow up phone call, you can ensure your proposal is reviewed in full by the foundation board and it will give your proposal the best chances for success.

There are issues to consider for the follow up phone call. If there have been any significant leadership changes since the delivery of the proposal, the follow up phone call is a great method for alerting the foundation to the change. If you have gained any additional support since the submission of the proposal, you could also share that information at this point. Also, if there are changes to your organization's financial information, it should also be shared during the follow up phone call.

The follow up phone call should not be dismissed as a redundant or unnecessary step in the cultivation process. Those who dismiss calls may lose grants because of simple oversights in the submission process. Your teacher in school always told you to check your work and the follow up phone call is a great way to make sure you have done everything in your power to get grant approval.

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Site Visits (Requested by the Funder)

Site visits are the best way for a potential supporting foundation to see firsthand what you do, how you do it, who you help and why their support is so important. Preparation for the site visit is essential to make sure the foundation representative walks away with a good impression and with all of the information they need to make their award decision.

Your organization's leadership should be available for the site visit. This is important because it allows the foundation to know personally whom they will be naming as the steward of their funding. During the visit, you need to convince the foundation that your organization is effective at what it does and is deserving of support. Finally, the foundation is conducting the site visit to learn more about your organization. Answer any questions they have and make sure they leave your organization with no questions left unanswered.

Knowing what to say to a possible funder can be difficult at times, but proper preparation can lead to a smoother discussion and more confidence on your part. A good method to facilitate a good site visit is to develop an outline or agenda of what you and the foundation representative will be discussing. During the follow up phone call, be sure to set up the location and time of the site visit, and ask the foundation representative what they would like to see during the visit. This will help you set up your agenda for the site visit. Remember, the site visit is to showcase your organization and convince the funder that your organization is a good investment.

During the actual site visit, you should also ask questions about the foundation. For example: you might ask about reporting requirements or data that the foundation might require you to collect. Before your visit ends, be sure that you provide the foundation representative with up-to-date materials to take with them (i.e. case for support, pamphlet, etc.), that you are clear on what the next steps in the award process are, and when you can expect to be notified of a decision. If the foundation representative requests information you do not have readily available, send that information to them as soon as possible. Finally, send the foundation representative a thank you to acknowledge the time and effort spent visiting your organization. Acknowledging they are not a "bank" from which you draw money helps to humanize your organization and increase your chances of grant approval. Confidence in yourself and your organization will go a long way in making for a smooth site visit.

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Response – The Decision

The next step in cultivation is “the decision.” There are four basic outcomes for a grant maker’s funding decision:

1. **No**, you did not receive the award.
2. You may have gained **Permission** from the foundation to submit a full proposal.
3. The foundation may require more **Information**.
4. **Yes**, you received the award you and your organization require.

If the grant maker has denied your request for funding, it is still important to thank them for their time in reviewing your proposal. This on-going communication with the grant maker may keep you on their radar if other funding opportunities become available or if their priorities shift. This also demonstrates that you are not just looking for a handout, but you are searching for a partner who can help support your mission. Following up with a thank you is also useful in finding out why your organization was not funded. Many foundations will simply provide a statement such as “*We get so many proposals from so many worthwhile organizations, but are only able to fund a small number.*” Being told “no” is not the end, your organization’s name is now known to the foundation and if you close your current request on a positive note, it may not rule out the possibility for funding in the future.

Many foundations require a letter of intent/interest/inquiry (LOI) as the first step in the proposal process. By adding this step, grant makers can weed out prospective applicants that do not match their funding interests without reviewing a full proposal, which saves time and resources for the grant maker and applicants. After completing and submitting your LOI to the foundation, you must receive permission from the foundation before submitting the full proposal. If you are invited to submit a full proposal, the cultivation arc begins again at the follow up phone call after submission.

Occasionally, the foundation will contact you to send them more information about a particular project or program. Respond to such requests as quickly as possible to allow the foundation ample time to read everything you have given them prior to the foundation board meeting. Also, by responding quickly it demonstrates to the foundation that you are going to do your part in the grant process.

If the grant maker has approved your request and has informed your organization of the award, your next step is to send the grant maker a thank-you letter. This letter should be a personal expression of gratitude, not an assimilation of platitudes. Provide statistics in the letter and tell the grant maker how many people their gift will help over the course of the grant period. Also, be certain that you have a clear understanding of the expectations of the foundation related to how funds are to be spent, reporting requirements, changes to the project, and overall progress.

✓ **TIP:** Use the **Relationship Touch Points** in the Toolbox section for an overview of the steps in contacting grant makers in the cultivation process.

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Reporting

What is stewardship?

“Stewardship” is the responsible planning and management of resources. A steward is one who acts on behalf of another. As a nonprofit leader, you act on behalf of the foundations that fund your programs and projects because they have financed your work. It is your job to act as the steward of each foundation's gift (grant) to ensure the programs or projects they have financed do as well as possible. By showing the foundation you are doing everything in your power to make the most of the funding you have received, it allows the foundation to trust your organization and they quite possibly may become continuous supporters.

Grant reports are a way to tell the foundation how their generous funding was spent and the impact on the community their support of the program or project has had. All foundations will want slightly different information for their grant reports, but all foundations want to know what you accomplished with their funding. At the very least, they will want to see a financial statement, the results of the program or project, and (if the project or program was a success) a sustainability plan. If the foundation does require reports, review the reporting requirements and organize them using a spreadsheet, which should contain the following information:

- How often will you report to your funder?
- What information does the funder require you to report?
- Does your funder have a required format or forms for reporting? If so, maintain those forms or format specification requirements in your grant file as well.

The next step in reporting is to develop a reporting strategy based on the requirements from your funder. This strategy should include:

- What data will you collect?
- How often will you collect data?
- How will you store or organize data?
- Who in your organization will be designated as the key contact for reporting and will be responsible for developing and submitting reports?
- How will you monitor reporting? Will reports be submitted to your Executive Director, your Board, and/or constituents for review?

If the grant maker has asked that you complete regular grant reports, submit all reports on time or early without exception. If the grant maker sees your organization is abiding by the award guidelines, they are likely to view your organization as good stewards of their resources and may be more likely to fund you in the future.

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Nurturing Grant Maker Relationships

Successful cultivation does not end once the gift is received. It is important that you continue to maintain contact with your grant maker beyond the receipt of the award to maintain their interest in your organization and build a relationship with them. Contact with the grant maker should not be limited to seeking funding support, but should focus on understanding what motivates them to support your organization, keeping them informed about your organization's activities, and engaging them to participate in organizational activities so that they can see firsthand the impact of their support. Remember, your focus should not be on getting short-term support from a grant maker, it should be to establish a partnership.

✓ **TIP:** See the Toolbox for examples of different types of thank-you letters to grant makers.

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Toolbox

- Grant Prospect Worksheet
- Grant Possibility Worksheet
- Decision-Making Matrix
- Relationship Touch Points
- Sample Thank You Letter for Meeting
- Sample Thank You Letter for Grant Award
- Sample Thank You Letter for Grant Continuation
- Sample Thank You Letter for Your Time (No Award)

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GRANT PROSPECT WORKSHEET

Date		
Potential Grant Provider Information		
Name		
Address		
Email		
Website		
Contact Person		
Financial Information		
Grant Amounts Given the Previous Year		
Is This Funder a Match for Your Organization?	Funder	Your Organization
Interests	1.	1.
	2.	2.
	3.	3.
Geographic Focus		
Type(s) of Support		
Population(s) Served		
Application Information		
Initial Approach (letter of inquiry, formal proposal)		
Deadline(s)		
Board Meeting Date(s)		
Notes:		
Follow-up:		

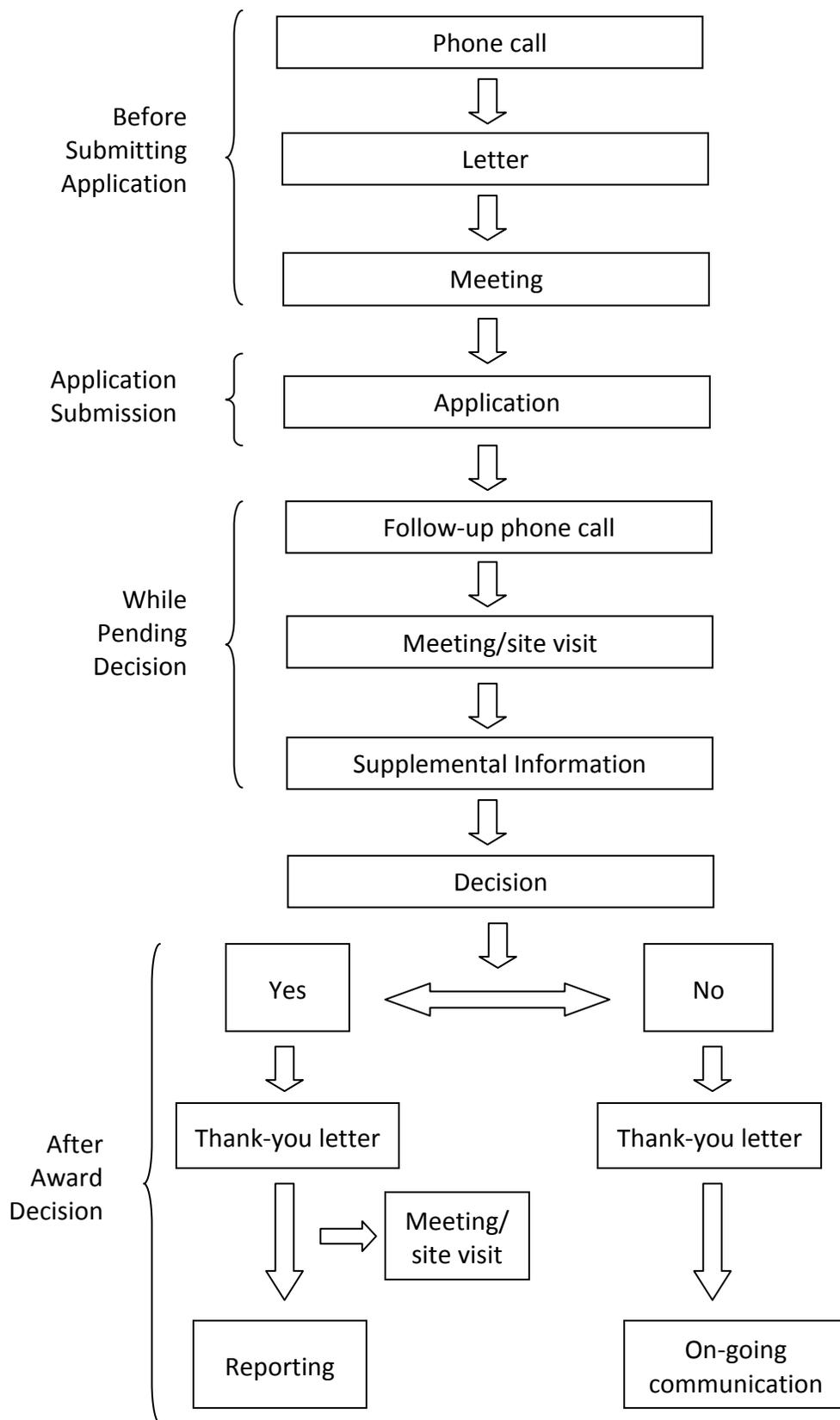
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DECISION-MAKING MATRIX

Organization: _____ Project: _____											Decision: <input type="checkbox"/> Pursue funding <input type="checkbox"/> Do not pursue	
Factors	Weighted Decision Criteria										Estimated Rating	
	Negative				Neutral			Positive				
	0	1	2	3	4	5	6	7	8	9		10
1. Fit with Funder Mission	No alignment with Mission				Marginal Alignment			Alignment with Mission				
2. Organization Fit (fits with mission, aligns with strategic plan, high priority)	No alignment, low priority and low impact				Moderate alignment; related to priority and moderate impact			High alignment; major priority and high impact				
3. Need (clearly documented community need and/or internal need)	Only anecdotal qualitative information				Some data to document need; not enough compelling information			Multiple qualitative and quantitative third party data sources				
4. Staff Experience and Credentials	No experience in area; improper credentials				Some experience in area; related credentials			Extensive experience; exceptional credentials				
5. Staff Time Commitment	No time to commit; not possible to reassign staff				Some time available			Required time commitment can be met by proper staff				
6. Partnerships	No identified partners or collaborative agreements				Potential partners or collaborators identified			Longstanding relationships with partners and collaborators				
7. Sustainability	Does not generate revenue; no future funding identified				Future sources of funding identified to cover some program costs			Future sources of funds identified to cover all program costs				
8. Staff Training and Development	Requires, but does provide for staff training and development				Minimal training required, some costs are covered			Minimal training is required and all associated costs are covered				
9. Organization Resources (space, staff, matching funds)	Requires a significant investment of resources, including admin and/or support staff time				Requires some investment of resources			Requires minimal or no match or investment of resources				
10. Operational vs. Programmatic	Provides support only to projects or programs, and no support to general operating processes				Provides a mix of operating and programmatic support			Provides a mix of support and may support organizational advancement				
11. Capability to Develop a Successful Funding Proposal	Do not have staff time to respond by deadline				Responding requires reallocating staff time, but can be accomplished			Adequate staff time is available to develop a competitive proposal				

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RELATIONSHIP TOUCH POINTS



**SAMPLE THANK-YOU LETTER
(For Meeting)**

[Date]

[Name of Foundation]

[Contact Name]

[Address]

[City, State ZIP Code]

Dear [Contact],

Thank you for meeting with [who from your organization was at the meeting] on [date] about our potential partnership and grant proposal submission. We appreciate the opportunity to introduce our organization to the [foundation].

We understand you are tasked with identifying the best matches for your foundation that allows you to steward your philanthropic resources. We know that competition for limited private funding sources is very high, and we understand that you have to make challenging funding decisions. So we are especially thankful that you took the time to share with us the best opportunities for our organization's engagement with the [foundation].

As we discussed, we will submit a proposal to you [estimated timeframe] for [\$request amount] to support [project concept]. Should you have any questions, please do not hesitate to contact me at [Phone Number] or [Email Address].

Thank you again for meeting with us. We look forward to finding new ways to work with the [foundation].

Sincerely,

[Name]

Executive Director

**SAMPLE THANK-YOU LETTER
(For Grant Award)**

[Date]

[Name of Foundation]

[Contact Name]

[Address]

[City, State ZIP Code]

Dear [Contact],

Thank you for the generous contribution of [\$X] from the [Foundation Name]. Your gift will be used to provide support to our [program], which [explainer]. [Provide one to four sentences on your outcomes/historical accomplishments with this program]

Your partnership and financial support makes it possible for us to expand our efforts to prevent local families from experiencing homelessness by teaching them how to maintain a financially stable household. Thank you for your generous support.

Sincerely,

[Name]

Executive Director [or similar title]

SAMPLE THANK-YOU LETTER (After Grant Continuation)

[Date]

[Name of Foundation]
[Contact Name]
[Address]
[City, State ZIP Code]

Dear [Contact],

Thank you for the generous [\$X] grant we received from the [Foundation Name] last year. With your help and that of many others during the past [X] years, [Organization Name] has opened its doors to hundreds of thousands of people in need in [Name of Community your Organization serves]. Your support has a real impact for people in need. As of today:

- Hungry men, women, and children were served [#] free nutritious meals at our sites.
- More than [#] men and [#] women were sheltered.
- Poor families accessed more than [#] tons of free food.

This year [Organization Name] will spend [your budget total] to meet the needs of the homeless and poor in our community. [Paragraph about how you've done this year and your vision for the next 12 months]

Is there an opportunity for [Organization Name] to partner again this year with the [Foundation Name]? We would be happy to provide you more details about our initiatives and are prepared to submit a full proposal at your discretion. If you have questions or would like a tour of our facilities, please contact [Staff Name], [Staff Title], at [Phone Number] or [Email Address].

Thank you again for your support and for considering a continued relationship with [Organization Name].

Sincerely,

[Name]
Executive Director [or similar title]

**SAMPLE THANK-YOU LETTER
(For Your Time – No Award Granted)**

[Date]

[Name of Foundation]

[Contact Name]

[Address]

[City, State ZIP Code]

Dear [Contact],

Thank you for your letter dated [date] informing our organization that our proposal was not selected for funding. We appreciate the opportunity to introduce our organization to your foundation. While we were disappointed, we understand you are tasked with identifying the best matches for your foundation that allows you to steward your philanthropic resources. We know that competition for limited private funding sources is very high, and we understand that you have had to make challenging funding decisions. We would appreciate any feedback you can offer that would make a future request from our organization more amenable to your Board [or reviewers, depending on foundation type]. If possible, would you please contact me directly at [Phone Number] or [Email Address] to discuss this matter?

Thank you again for reviewing our proposal. We look forward to finding new ways to work with [foundation] in the future.

Sincerely,

[Name]

Executive Director [or similar title]