

Developing, Cultivating and Maintaining Relationships with Foundations

Session at a Glance

- Foundation Overview
- Current Trends in Grantmaking
- Grantmaking Process
- Funder Compatibility - Finding the Right Match
- What Foundations Look For When Making an Investment
- Approaching a Foundation
- Maintaining a Foundation Relationship

Foundation Overview.



In 2010 over **\$290 Billion** was given to non-profits in the United States



Types of Foundations



Family Foundation

- Family members play a significant role in decision making
- Giving is aligned with values and interests of family



Corporate Foundation

- Geographic connection
- Aligned with corporate citizenship goals and values

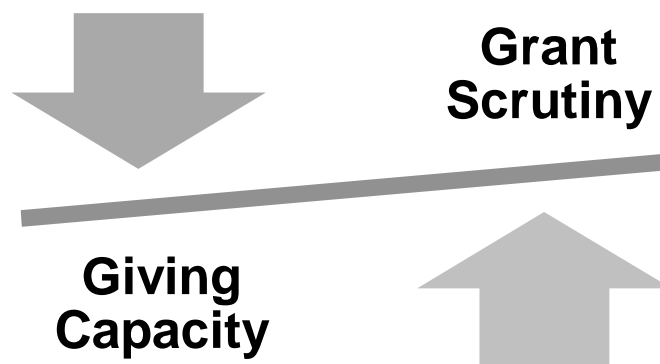


Community Foundation

- Supports organizations and programs in a specific geographic location
- Focus is on local and regional needs

Current Trends in Foundations.

The Economy and Effect



The Economic Impact

Decrease in **Number of Grants** Awarded

Decrease in **Size of Grant** Amounts

Decrease in the **Number of New Grantees**

Decrease in the **Number of Multi-Year Grants**

Decrease in **Capital Grants**

Invitation only

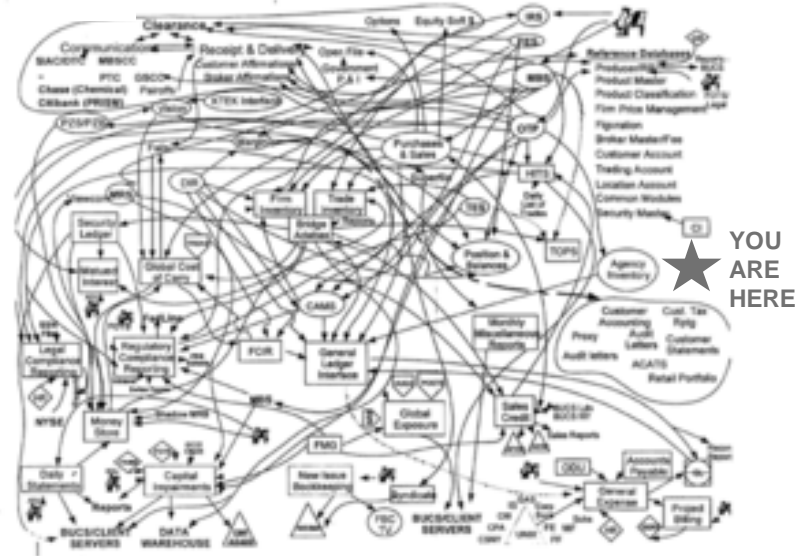
Reassessment of priorities

Accountability emphasis

Foundation Center
2010 Foundation Growth and Giving Estimates
1,300 Foundation Respondents

The Grantmaking Process.

Navigating the Foundation Maze



Working with Foundations Takes Time



- Identification
- Initial Approach
- Paperwork submission
- Review
- Decision
- Follow-up

Funder compatibility.

What Foundations Look For
When Making an Investment.

**The
Right Fit.**



Interest

Geographic Area
Priority Focus
Population Served



Type

Direct Service Providers
Intermediaries
Advocacy

Life Stage

New Growth Mature Turnaround

Identifying Foundations Finding the Right Match

Peer Research

- Senior Centers
- Community Centers
- Hospice
- Food Banks
- Hospitals

Foundation website

- Grant Guidelines
- Annual report
- IRS Form 990

www.guidestar.org

www.foundationcenter.org





Seniors
Health
Vulnerable
Populations
Food
Quality of Life
Civic
Engagement
Nutrition
Self sufficiency

Homework

Interest areas
Geographic area served
Types of Organizations
Award ranges
Operating, program, capital support
Primary foundation contact

Questions Foundation Staff Ask When Reviewing Requests



- How are they **different** than....?
- Are they making an **impact**?
- Will a grant really make a **difference**?
- How effective is there **leadership**?
- Do they have the **capacity** to implement?
- How will this request be **sustainable**?
- Who else is **supporting** them?
- Is the organization a good **community partner**?
- What is the **track record** of success?
- Is this a high **quality** program?
- is the organization meeting a **community need**?

The Challenge

Helping a Foundation Understand the
Purpose of Your Organization and the Need
for Its Existence

Approaching a Foundation.

HELLO
my name is

Meals On Wheels



Email
Phone Call
Facilitated introduction

Goals | Personal connection



- 1** Introduce yourself, organization and project
- 2** Explore fit with interests and get a reaction of funding probability
- 3** To identify next steps:
 - Meeting
 - Site visit
 - Invitation to apply

***Reminder:** Be sure to allow plenty of time. The average foundation process from introduction to funding can take 6-12 months.

What do I say?

“My name is Joanna Nixon and I’m calling on behalf of Meals on Wheels of Jackson County.

I have reviewed your grantmaking guidelines and see your foundation has an interest in **nutrition, seniors and self-sufficiency.**

Our mission is to x and we provide 2 meals a day to over 75 low-income seniors a week in rural Jackson County. I think our x program might be of interest to the foundation, **I was wondering if I could schedule a time to meet** with you and tell you more about the impact we are making in the lives of low-income seniors.”

Possible Responses



Set-up a meeting
Set-up a site visit
Submit more information
Submit a letter of inquiry
Submit a application or proposal



No response to email or phone call

“Not of interest at this time.”

- Find out why
- Explore the possibility of future funding
- Keep the funder informed of your work

**No usually means
“not now” “not ever”**

Meeting tips

A foundation is looking to **build knowledge** of your organization, **see evidence of the strength of your program** and **meet the leadership** of your organization

- 1 Find out in advance what a foundation staff person wants to see or learn**
- 2 Differentiate your organization**
- 3 Involve your Board, a volunteer or program participants**
- 4 Ask Advice**

Meals on Wheels At A Glance

Established in **1990**

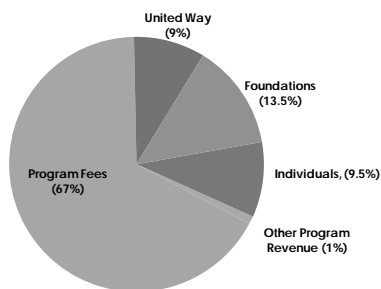
4 Full-time staff **2** part-time staff

1,500+ seniors served each year

7 Pennsylvania counties served

\$500,000 annual budget

Revenue Sources



Board of Directors

Board member name
Affiliation

Board member name
Affiliation

Board member name
Affiliation

Board member name
Affiliation

Board member name
Affiliation

Board member name
Affiliation

Partners

Jackson County Hospital

Jackson Senior Center

Riverview Hospital

Tri-County Community Center

Alexander Mental Health

Meals on Wheels of Jackson County
25 S. Illinois Ave.
Alexandra, PA 69870
(xxx) xxx-xxxx
www.mealsonwheelsjackson.org

Executive Director: Sarah Cook



Meals on Wheels Overview



What We Do

Home Delivered Meals: 2 meals per day seven days a week

Nutrition Counseling

Social Work assessments and referrals

Intensive Case Management for over 300 clients per year

Preventative Home Safety Services including grab bars, railings and smoke detectors

Who We Serve

59% are age 75+

96% are low-income

79% have dietary restrictions

67% live alone

37% have a disability



2010 By the Numbers

375

Volunteers

12,000

Meals
Delivered

1,800

Home Bound
Seniors
Served

7,800+ Seniors served since 1990



Avoid Common Mistakes

- 1** Submit the request that was discussed and for the amount provided
- 2** Meet Deadlines
- 3** Follow instructions (page limits, presentation)
- 4** Review for typos and make sure budgets add up correctly
- 5** Be honest and accurate about partnerships, supporters and costs

Maintaining a Relationship.

Maintaining a Relationship



Stay in Touch

- 1 Send thank you notes
- 2 Avoid gifts of appreciation
- 3 Provide periodic personalized organization updates
- 4 Extend a personal invitation for a follow-up site visit
- 5 Report back on your progress
- 6 Add foundations to your mailing list
- 7 Be proactive when something goes wrong

Questions?

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