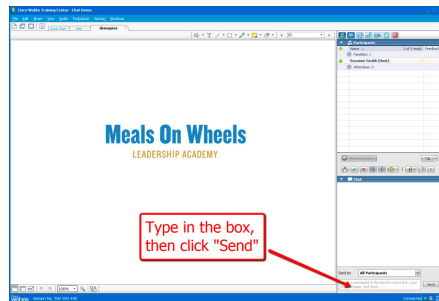


Welcome to Developing, Cultivating and Maintaining Foundation Relationships

Take a moment to introduce yourself:

1. What is your position or job title?
2. What is the name and location of your program?
3. How many clients does your program serve in a day?

*Please type your responses in the webinar "Chat" box...
Make sure "Sent to" says "All participants" and click "Send"*



1

Developing, Cultivating and Maintaining Foundation Relationships

Session at a Glance

Part I: An Overview of Foundations: February 9 (3:30-4:30pm EST)

- History of Foundations
- The different types of Foundations that exist
- Researching foundations that are a match for your organization and programs
- Differences and similarities in how foundations communicate their processes and priorities
- How to begin your initial approach and funding request to a Foundation

Part II: Developing, Cultivating and Maintaining Foundation Relationships: February 16 (3:30 to 4:30 PM EST)

- A more in-depth conversation on the Do's and Don'ts for building, cultivating and stewarding long-lasting relationships with Foundations.
- Strategies for getting the attention of foundations who may not be aware of your organization
- Maintaining an existing relationship your organization has with a Foundation



80

**The
Right Fit.
A Positive
Impression.**

Foundation Decision Making.

Working with Foundations Takes Time



Introduction

Paperwork
submission

Review

Decision

Follow-up

The Challenge

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

The Decision Making Process

Guidestar
Organization website
Grant proposal
Conversations with staff and board
Community Partners
Peer organizations
Other funders (potential and committed)
Site visits

www.guidestar.org

The screenshot shows the Guidestar website interface. At the top, there is a navigation bar with links for Products, News, Blogs, About Us, Contact Us, Help, and My Account. Below this is a search bar and a menu with options like 'Update Nonprofit Report', 'Analyze Nonprofit Data', 'Take Action', and 'Review A Charity'. The main content area is divided into several sections: 'Charity Check Preview' with a 'Print Charity Check Report' button; 'IRS Publication 78 Details' showing a 'Verified' status and organization information; 'Organizational Statistics' with a table showing 0 full-time employees, 0 part-time employees, and 0 volunteers; 'Board of Directors' with a table for Name and Title; and 'Officers for Fiscal Year' with a note about available data for 2009-2007 and 2006.

Review your Guidestar profile at least twice annually

1. Verify for accuracy
2. Update missing or inaccurate information
3. Verify Publication 78 approved

Free updating for nonprofits.

The importance of your website

Over 65% of individuals will review your website before making a donation

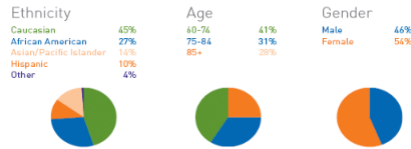
The screenshot shows the website for Meals on Wheels Chicago. The header features the organization's logo and the tagline 'home is where comfort is'. A navigation menu includes links for 'our programs', 'get assistance', 'get involved', 'news & events', and 'learn more'. The main content area has an 'About Us' section with a sub-menu for 'History', 'Our Funders', 'Board of Directors', 'Associate Board', and 'Staff'. A 'Donate Now' button is prominently displayed. The 'Mission' statement is also visible, emphasizing the goal of ensuring homebound senior citizens and disabled Chicagoans maintain dignified and independent lifestyles.



Meals On Wheels at a Glance

Our Clients

- We currently serve over 1,800 homebound seniors
- 66% live alone
- 63% are on modified diets – low sodium, diabetic, or mechanically softened



- **Income** – Over 96% of our clients are considered low income and live on fixed incomes.

Our Meals

- We serve 18,000 home-delivered meals per week
- Last fiscal year 2009-2010, we served more than 922,330 meals to over 2,400 unduplicated clients

The Budget

- Approximately \$6 million operating budget
- 43% of our budget is funded by City of San Francisco contracts
- 37% of our budget is raised from individuals, corporations, and foundations
- 85% of MOW income dollars goes directly to meal delivery & services for clients
- The cost of providing meals for one senior per year is \$4,329 - approximately the cost of a one day stay in the hospital

Foundations look for the following on websites:

- Mission and History
- Program overview
- Staff and board
- Contact Information
- Financial information
- #'s and demographics
- Supporters

Grant proposal

Clear case for support (need and impact)

and composition of numbers served

Trends

Realistic implementation plan

Budgets are realistic and accurate

Community partners and supporters

Board engagement (giving, leadership, knowledge)

Outcomes (impact beyond #'s served)

Financially healthy

Common grant proposal missteps

Missed deadlines

**Did not follow submission instructions
(format, page limits, copies, packaging)**

Unrealistic budget

Budgets don't match narrative

Mistakes: Typos, numbers don't add up

Didn't submit for the purpose amount discussed

Knowledge assumptions

Use of jargon and acronyms

Inaccurate community partners and/or financial supporters

Conversations with staff and board

Knowledgeable about problem you are trying to solve

Quality leadership and expertise

Vision and strategic direction

Clear understanding of needs and priorities

Financial discipline and stewardship

Clear articulation of purpose and need for existence

Efficient and effective operations

Partner and peer organization conversations

Good community partner
Efficient and effective
Clear understanding of role and value add
Quality leadership and staff
Meeting a community need

Site visits

See program in action
Conversations with nonpaid staff (participants, board members, volunteers)
Quality programming
Quality and competent leadership and staff

Poor site visit experiences

Stories from a grant maker

- Inaccurate or inadequate directions and logistics
- Staged or unauthentic experiences
- Staff or board unprepared to answer questions
- Didn't do foundation homework in advance
- Limited to conference room or office
- Knowledge assumptions and use of jargon
- Overwhelming number of meeting attendees
- "Rambling script"

Best site visit experiences

Stories from a grant maker

- Asked what I wanted to see or discuss
- The right people in the room
- Sent materials in advance
- Site visit confirmation, map and parking
- Engaging experience and conversational
- Attention to detail
- Asked for opinion and advice
- Clearly articulated history, purpose, priorities and needs

Meals On Wheels of Texoma At A Glance

Established in **1980**

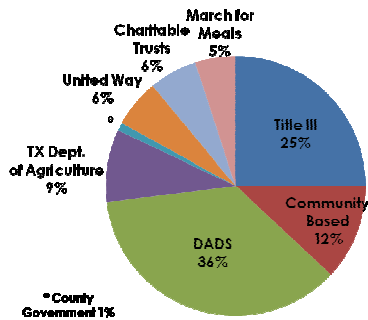
6 Full-time staff

1,580 seniors served each year

15 Locations in **3** counties served

\$1,800,000 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

Texoma Council of Governments

Area Agency on Aging;

Elderwatch

Meals On Wheels of Texoma

4114 Airport Drive

Denison, TX 75090

(xxx) xxx-xxxx

www.mealsonwheelstexoma.org



Serving Cooke, Fannin & Grayson Counties of Texoma

Executive Director: Greg Pitman

Texoma Meals On Wheels Program Overview

7,870 Seniors served since 1980

What We Do

Home Delivered Meals: 1 meal per day six days a week

Senior Center Meals: 46,980 per year, delivered 5 days a week

Referrals by the Department of Aging and Disability Services (DADS), AAA's Elderwatch and Self-Referral

Volunteers help monitor health of our clients

Senior Center Managers work closely with Case Workers

Whom We Serve

1,070 Clients are 75 or older

460 Clients are Low Income

1,050 Clients Live Alone

124 Clients are Disabled



2010 By the Numbers

624
Volunteers

436,800
Meals
Delivered

1,400
Home-Bound
Seniors Served

180
Seniors in
Senior Centers



Developing a Relationship

HELLO
my name is

**From Meals on Wheels
of Texoma**

Written Communication
Email
Phone Call
Meeting or site visit



Important to relationship building
Increases likelihood of success



Who Should I Talk With?

Scenario	Approaching a Foundation
Small foundation	<ol style="list-style-type: none"> 1. Individual listed on website (Executive Director, Board President) 2. If contact is unknown, call and indicate you are interested in applying for a grant, inquire about the most appropriate contact
Large foundation multiple staff	Program Officer or Grant Officer responsible for health and human services grantmaking
Invitation only	<ol style="list-style-type: none"> 1. Contact listed on website 2. If contact is unknown, call and indicate you are interested in applying for a grant, inquire about the most appropriate contact
No phone calls	Follow instructions on website or in written materials
Guidelines indicate to submit an online application	Try and have a conversation prior to the submission process to get confirmation of request and amount . call and indicate you are interested in applying for a grant, inquire about the most appropriate contact

The Online Submission Process

THE CHICAGO COMMUNITY TRUST
AND AFFILIATES

COMMUNITY IMPACT RESEARCH & IDEAS ABOUT US NEWS & PRESS LOGIN

Give
Invest in a stronger, healthier community.
[LEARN MORE](#)

Apply
Find grant opportunities to support your work.
[GET STARTED](#)

SEARCH

Contact Us
Grants Calendar
Our Grants
Our Donors

Application Process
For most strategic grant opportunities, the Trust will issue open, public Requests for Proposals (RFPs). Each RFP will detail the outcomes sought by the Trust, and the criteria used to award grants. RFPs will be published on the website in each specific [funding priority](#) and will contain complete details and deadlines.
The Trust is now using a transitional online system for submitting applications. The format will be new to all applicants, including those who have already received funding from the Trust. Review these instructions [before you start](#).

Contact the Trust's Staff

Departments

- [President's Office](#)
- [Program](#)
- [Development and Donor Services](#)
- [Human Resources and Administration](#)
- [Finance](#)
- [Information Technology](#)
- [Marketing and Communications](#)
- [The Arts Work Fund](#)
- [Fresh Taste](#)
- [The Partnership for New Communities](#)
- [Smart Chicago Collaborative](#)

Program

Ngoan Le Vice President nle@cct.org (312)616-8000 x 182	Suzanne Connor Senior Program Officer, Arts and Culture sconnor@cct.org (312)616-8000 x 118
Juanita Lizary Program Officer, Basic Human Needs juanita@cct.org (312)616-8000 x 160	Jim Lewis Senior Program Officer, Basic Human Needs jlewis@cct.org (312)616-8000 x 158
Gudelia Lopez Senior Program Officer, Education glopez@cct.org (312)616-8000 x 101	Karen-Jo Mensch Senior Administrative Assistant mensch@cct.org (312)616-8000 x 144

What do I say?

"My name is Joanna Nixon and I'm calling on behalf of Meals on Wheels of Texoma, Texas.

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

Our mission is to promote and support the health and quality of life of senior citizens and disabled persons by preparing, serving, and delivering meals and we provide 1 nutritionally balanced meal a day to over 1,500 low-income seniors annually in part rural, part urban areas in Cooke, Fannin & Grayson Counties in Texas. I think our Meals On Wheels of Texoma 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."



**“Not of interest
at this time”**

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

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

**Cultivating and Maintaining a
Relationship.**

Maintaining a Relationship



- 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

Don't be
A Stranger.

Engaging a Foundation



Major Donor Communications

Quarterly correspondence from the Executive Director

Updates on the Cause/Issue

This section is an opportunity to provide updates and share specific expertise related to your mission or work.

- Examples include:
- New stats or recently released research
 - Trends or changes in the population you serve

Significant Accomplishment or Announcement

This section is an opportunity to share an important milestone, accomplishment or announcement with donors.

- Examples include:
- New program or program expansion
 - A significant foundation or individual gift
 - Program milestone or anniversary
 - New community partnership

What's Coming Up?

This section is an opportunity to share what you are looking forward to in the upcoming quarter.

- Examples include:
- Launch of a seasonal activity or program
 - Implementation of something new or beginning of a new program or class

Story of an Individual or Family Impacted

This section is an opportunity to share how your work is making an impact on an individual served by your organization. Include a photo and describe specifically how your work is making a difference.

Opportunities to Get Involved

This section is an opportunity to share specific opportunities for the donor to connect with the organization in the upcoming quarter beyond giving a financial contribution.

- Examples include:
- Volunteer (individual and family opportunities)
 - Special Event participation

Did you Know?

In this section, you can provide some "by the Numbers" statistics about your organization's activities and programs.

- Examples include:
- # of individuals impacted
 - # of counties served
 - # of volunteers
 - # of attendees at a recent special event
 - # of community partners

2,000 children and adults served annually

700 volunteers provide over 5,000 hours

12 Indiana counties served

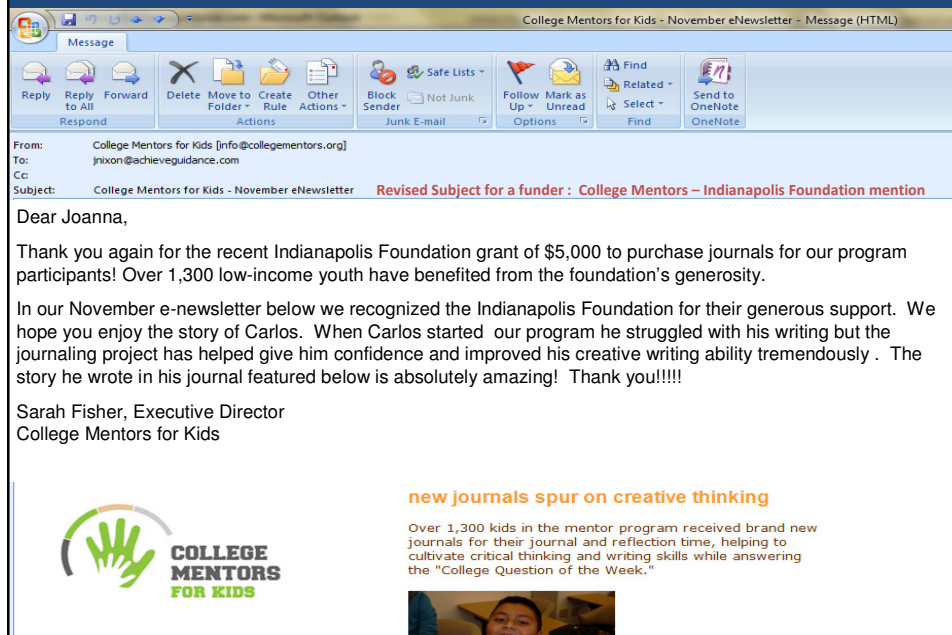
125 individuals on the waitlist for xyz program

Stewardship

Quarterly Communication Roadmap

- Updates in the Cause or Issue
- Organization Updates
- What's Coming Up
- Story of an impact
- Opportunities to get Involved beyond giving (individuals)

Personalized and intentional communications make a difference



Message

College Mentors for Kids - November eNewsletter - Message (HTML)

Reply Reply Forward Delete Move to Create Other Block Safe Lists Follow Mark as Find Related Send to
to All Respond Actions Junk E-mail Options Find Select OneNote


From: College Mentors for Kids [info@collegementors.org]
To: jnixon@achievetheguidance.com
Cc:
Subject: College Mentors for Kids - November eNewsletter **Revised Subject for a funder : College Mentors – Indianapolis Foundation mention**

Dear Joanna,

Thank you again for the recent Indianapolis Foundation grant of \$5,000 to purchase journals for our program participants! Over 1,300 low-income youth have benefited from the foundation's generosity.

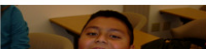
In our November e-newsletter below we recognized the Indianapolis Foundation for their generous support. We hope you enjoy the story of Carlos. When Carlos started our program he struggled with his writing but the journaling project has helped give him confidence and improved his creative writing ability tremendously. The story he wrote in his journal featured below is absolutely amazing! Thank you!!!!

Sarah Fisher, Executive Director
College Mentors for Kids

 **COLLEGE MENTORS FOR KIDS**

new journals spur on creative thinking

Over 1,300 kids in the mentor program received brand new journals for their journal and reflection time, helping to cultivate critical thinking and writing skills while answering the "College Question of the Week."



Conclusion

- 1. Make sure that all the ways a foundation can learn about you give the impression you want (website, Guidestar, written materials, conversations)**
- 2. Create compelling and engaging conversations and site visits.**
- 3. Think about the various ways to engage a foundation beyond a grant. How many different things are you doing to cultivate and maintain your foundation relationships?**
- 4. Stay in touch regardless if a grant is awarded or not.**

Questions?

Joanna Nixon, Strategy Consultant

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www.achieveguidance.com

317.637.3000

