

Lesson 9A2: Do's and Don'ts of Communicating with Foundations

Here are a few key points to keep in mind when communicating with a foundation:

Do's & Don'ts

- ✓ Follow any instructions the foundation provides about reaching out to them prior to applying. (Some may want to schedule a phone call between your organization's top leadership and their program officer, board member, or executive director.)
- ✓ Communicate with a funder when your organization makes changes to a program the funder invested in. Even if the changes do not impact your overall budget, the funder is anticipating that you will work toward the objectives that you outlined in your initial proposal. By informing them of any changes, you are building a trust-based relationship that will make them more likely to support your organization in the future .
- ✓ Establish a consistent contact person at the foundation. An application should generally be submitted under the name of the organization's CEO or Executive Director. Likewise, any preliminary conversation between your organization and the funder should occur with your organization's top leaders. Communications like these are opportunities to build relationships. Give the funder a chance to get to know someone at your organization who is likely to be around for a while, and who can movingly articulate the organization's vision.
- ✗ Push for an invitation too soon or too overtly. If the foundation accepts letters of interest/ inquiry/ intent (LOIs) by invitation only, it's usually not worth your time to try to reach out to them – in fact, that could be a strike against your future chances of ever applying. However, if you have a board member who knows someone in their leadership, a casual one-on-one conversation (with no “ask” involved) might help pave the way.
- ✗ Communicate with the funder during the application process unless the funder has instructed you to do so, or you are asking informational and/or clarifying questions about the grant process itself. In that case, be sure to follow any instructions the foundation may have provided (if any) on how to reach out to them with questions

Do's

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- ✓ Include the foundation, with their permission, in general organizational updates (e.g., the newsletter). You should not be asking for funding every time you communicate with them.
- ✓ take the time, when possible, to reach out to provide quick updates, by phone or email, every few months. Ideally, this outreach should be done by the organization's CEO/ ED or, in some cases, by a board member or development director. Communications like this are an opportunity to tell the funder the organization's latest news; it allows for "discovery" by the funder of new initiatives that might be of interest.