



Developing relationships with funders

Before you've got funding, you can develop relationships by:

- Researching and calling funders
- Going to 'Meet the Funder' events
- Going to meetings and conferences
- Inviting funders to your events
- Contacting previous funders
- Networking at events and conferences especially those focussing on your area of work – funders interested in this area may attend

Additional points:

- Make sure you have read all the information provided by the funder, especially their application guidance and criteria. This is essential but many grant applicants do not do this. There is no point wasting effort on a funder who does not fund your kind of work (or organisation – e.g. non-registered charities).
- Check whether you can ring them – some smaller trusts categorically state that contact must be by letter only; some larger funders have helplines. If there's a helpline or a phone number to answer any questions you may have – use it!
- If you've been funded by a funder previously, ring your contact there to tell them about what your organisation has been doing, discuss future funding, application deadlines, possibilities for continuation funding (if recent). If you had developed a good relationship with them previously, they're likely to be pleased to hear from you!

When you ring charitable trusts and foundations:

- Prepare your questions before you ring – write them down if necessary. Be clear about the work you'd like them to fund so you can explain it well.
- Engage the grants officer or trust administrator in conversation about the project – listen and write down the points they tell you. Sometimes, grants officers provide some extra information about the funders' priorities, help you to understand the specific emphasis or approach of their grants committee – it is a good idea to take notes.
- You may have more than one project in mind; you could discuss two possible projects with a funder, so long as they are both clear and meet the funder's criteria. By discussing a couple of options with the funder, you may get a better idea of which project is most likely to be successful.
- If it's not clear from their published information, ask them – how much money is it acceptable to ask for? If average grants are listed on their websites or printed information, check that the amount you want to ask for is acceptable.

- Read their website and ask some specific questions. Check whether the work or project you would like them to fund fully meets their criteria. Show that you have done your homework and really thought about your project in detail. Grants officers will remember this and are more likely to advocate on your behalf when you send in your application.
- Many funders list the grants they have given out recently. Read through these lists to get a clearer idea of the types of projects the funder likes to fund, location of recent projects, average amount of grants etc.
- When talking to funders, try to mention an example of how you've supported a particular service user and the difference this has made. A powerful and specific example is more likely to stick in a grants officer's mind.
- If anything is not clear to you about a funder's process or application form – check this out with them. Make sure you understand their questions. Sometimes discussion about the meaning of questions will also enable you to understand their criteria better.
- Smaller trusts: Ask them what kind of work they generally like to fund (if this is not clear from their information)
- Smaller trusts: Try to ask what kind of letter they would like? How long?
- Smaller trusts: If possible, engage them in conversation before applying – talk about your work, the project you have in mind etc.
- Smaller trusts: A friendly conversation with the trust manager or administrator can enable you to build a good rapport with her/him. If you make contact with staff in a smaller trust (and they know and like you) this could influence the process. Note – with larger or government funders, it is more difficult to build relationships with staff as there are usually several members of staff, many applications and stricter procedures.
- Bigger funders: If the project you have in mind doesn't quite meet the criteria, check how it could be adapted to fully meet their criteria. However, be careful – don't just ring up and say you want to apply, what would they like to fund? This shows you haven't read their criteria, and don't have clear priorities as an organisation. Grants officers will also remember this!

Preparing for phone or face to face interviews:

- Find out what the format of the interview will be, who needs to be involved, the type of questions they will ask
- Make sure all the relevant people can be there, if only for part of meeting
- If the meeting is taking place at your premises - be welcoming! Make sure everything is running smoothly – it is good to choose a day when activities are happening but things are not too chaotic. Offer refreshments if appropriate.
- Have all your paperwork ready and organised – funding application, governing document, policies and procedures, leaflets, annual report, etc.
- Think about the type of questions the funder might ask and prepare your answers, especially if you think you may have to deal with any difficult issues. (just like a job interview!)
- Tell them about real examples of how your organisation has helped individuals change their lives.
- Keep a 'credibility file' – copies of articles/press cuttings, letters of support, letters or quotes from beneficiaries, case studies, leaflets, reports, research and stats that support the need for your work, photos, quotes or endorsements from

prominent people or key people in your area/sector, evaluation reports (including summaries of key points), etc.

- Be polite (even if they annoy you!) – but assertive
- Thank them for taking an interest in your work
- Find out how and when they will make a decision

If you are successful:

- Ring and/or send a thank you letter and/or return grant agreement documents (and bank the cheque!) as soon as possible – otherwise the funder will think you don't really need the money and your relationship will get off to a bad start.
- If you're not clear about the monitoring requirements, clarify as soon as possible so you can get your systems in place or adapted right away
- Tell funders about your difficulties as well as your successes. This can also contribute to building a **good** relationship – if something is not going well and you can explain why; most funders will understand and negotiate changes. If you hide difficulties from them, this is much more likely to sour the relationship, lead to more problems for the project and/or organisation, and could jeopardise future funding
- Keep the funder up to date with your activities and successes, beyond their standard monitoring requirements e.g. regularly send articles, success stories, letters of thanks from beneficiaries, endorsements by influential people etc.
- Grants officers/funders may not be able to attend your events or visit – but it is still important to invite them. It shows them that you are a thriving organisation and confident about the quality of your work.
- Prepare for visits by funders (similar to points re: visits before funding)
- Doing great work, doing what you said you would do, sending in monitoring reports on time – all help to build good relationships with funders. They will see you as a reliable, high quality organisation. This will also help to build your reputation and relationships with other funders – **they talk to each other!**

If you are not successful:

- Getting feedback is very important. Some funders offer specific feedback and this can be very useful for improving future applications. If the funder says there were simply too many good applications this could be true but try and find out more about why others were successful – it may be because the funder wanted to reach different regions or received too many applications for a particular type of work.
- If you really believe that a specific funder fits your work, keep in touch with them by sending reports of successful projects funded by other funders in the hope that they will fund you in future.
- Be persistent – don't give up! Being rejected feels bad but it's important to keep going. Most organisations get many more rejections than successes.
- Try to maintain your confidence and enthusiasm – remember *why* you're fundraising (to improve the lives of your beneficiaries); if you believe in your work, this will come across.
- Plan when and who you are going to apply to and stick to the plan (even if some applications are rejected)
- Get support – work with others who you respect, to give each other encouragement and constructive feedback.