

U.S. TRUST

FUNDER-NONPROFIT RELATIONSHIPS BEST PRACTICES AND COMMON HAZARDS

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- Read ALL available instructions and information from funders (websites, guidelines, lists of previous grants)
- Make sure your organization's work and mission aligns with the funder's previous grant history and stated guidelines



- Write a poorly constructed proposal; this could leave such a bad impression with funders that good ideas may be overlooked.
- Apply for grants that don't match your mission



- Make sure that any numbers or figures in your proposal paint the true picture of your organization and program offerings
- Be candid about numbers served



- Use non-standard terminology or definitions which only makes sense to your organization
- Try to mask a numbers served or success rate by using only numbers or percents.



- Be cognizant of application deadlines and requirements
- If a funder takes time to talk to you, really listen to the advice



- Send in an application for funding after the deadline
- Disregard the tips that the funder gives you about your application



- Make sure the budget that you submit with your proposal shows sufficient staffing and/or supplies for your proposed
- If you have patterns of deficits or other financial challenges, make sure you have addressed them within your proposal



- Write a program budget that would be infeasible in terms of supporting the program.
- Leave out explanations for deficits or sudden changes in revenues.



Know the law

- 990 filing requirements
- State requirements about audits
- Lobbying, electioneering, etc.



- Ask for direct support of lobbying
- Ask for a grant that could tip your organization



- Make sure to address what your board is doing in terms of sustainability
- Make sure you have diverse funding sources (or be able to adequately explain why you don't)



- Say your “sustainability” is to write more grants
- Take ongoing funding as a given (absent specific multiyear funding agreements)



- Be transparent and concise when discussing important information about your organization



- Conceal information about services, success, or changes in the organization within the proposal



- Take credit for the strengths of your organization



- Engage in non-useful hyperbole, particularly about the “unique” nature of your services



- Find appropriate advocates for your project or organization
- Ask for feedback on your proposals (and rejections)



- Try to leverage random relationships to benefit your application
- Ask large numbers of people to call the foundation on your behalf
- Place calls when the website/guidelines clearly say not to



- Make sure to check your proposal for simple errors such as spelling or incorrect calculations
- Make sure that all of the details mentioned in your proposal are accurate



- Include the wrong funder's name or location
- Have varying request amounts throughout the proposal