

Individual Communication Templates

Initial communication options with your individual donors to assess their current giving priorities, informing them of your organization's status during the crises or major change, and how to continue the relationship moving forward.

EMAIL TEMPLATE

Dear [DONOR NAME],

- Include an intro that is as personal as possible to what you know of your donor – professional and personal info (inquire about family, how is their summer going, etc). Stand out as a human being that is invested in the relationship on various levels.
- Inquire about their change agency– include acknowledgement of specific projects they have been involved in, or board service, or any significant changes you are aware of that shows you know this donor and care about their activities.
- Update them on your organization briefly– include details of stories, accomplishments, leadership changes, and plans for the future. If confronting challenges of a crisis, be transparent of the issues and how the organization is confronting these issues.
- Checking in about current fundraising efforts (another spot to mention the importance of their funding and how its impacting your organization.) You should also mention your upcoming opportunities for them to engage with your work.
- In closing the email make sure to re-iterate the importance of your relationship and leave space for the follow-up (whether they don't respond immediately and you gently circle back, or to allow for future updates of your programming & activities).

Potential Follow-Up Responses: (if they respond to email)

1. If there are changes to their giving (either a transition in priorities or suspending funding activities), make sure to understand their situation and leave the door open for future communications. And of course keep them on your list to monitor future changes that would open the door again to funding.
2. No matter what, make sure to thank them for the current and past funding and how you are looking forward to working with them in the future. Make sure to have them on any general mailing list for future announcements and follow them on appropriate social media channels.

3. If the donor does not anticipate any changes in their giving, this could be an opportunity to ask about an increased gift amount or funding a new project that fits their priorities (good to wait on this inquiry until after there is some back and forth of information).
4. Set up a phone call!

PHONE CALL SCRIPT

- At the start of the conversation, be as personal as possible to what you know of your program officer – professional and personal info (inquire about family, how is their summer going, etc). Stand out as a partner that is invested in the relationship on various levels. Offer ideas for collaborations as you see fit within your networks. And of course, ask good questions and LISTEN.

“It is so wonderful to be connecting again. How are you? How is your family? How is your other work at X organization? What are your greatest hopes? Fear? Concerns? For 2020? For 2021?”

- Inquire about the family – include acknowledgement of specific initiatives they have supported or any other significant details you are aware of that shows you know this donor and care about their activities.

“The project you helped fund last year is still running. We addressed COVID-19 by doing X. What other questions do you have?”

- Update them on your organization – include details of stories, accomplishments, leadership changes, and plans for the future. If confronting challenges of a crisis, be transparent of the issues and how the organization is confronting these issues.

“It’s been tough. We are still in the midst of our founder’s succession plan and we had to let two staff go. Yet we did plan to plant 10,000 trees in August through our Kenyan initiative. Taking every day one step at a time!”

- Checking in about current giving (another spot to mention the importance of their funding and how its impacting your organization.) You should also mention your intention to ask them to give this year and if there is any new information or insights about their philanthropy that you should take note of.

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“I would love to check in today and know a bit more about your plans for your philanthropy this year and next. We have really been honored to partner with you since 2008 on this work so curious if anything has changed this year in your mind, due to the crisis and such? Do you still plan to step in and give similar to 2019? I really appreciate it as we plan for the remainder of the year and to support our team in the field.”

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Variations of responses depending on information gathered from the donor during your call:

1. If there are changes to their giving (either a transition in priorities or suspending funding activities), make sure to understand their situation and leave the door open for future communications. And of course keep them on your list to monitor future changes that would open the door again to funding.
 2. If you are not in their giving priorities this next year, make sure to thank them for the current and past funding and how you are looking forward to working with them in the future. Make sure to have them on any general mailing list for future funding announcements. And follow them on social media as well.
 3. If the donor does not anticipate any changes to your current funding pool, this could be an opportunity to ask about an increased gift amount or funding a new project that fits their priorities. Ask to set up another call to discuss such so you can circle back with your team around needs.
- At the close of the call, make sure to re-iterate the importance of your relationship and leave space for the follow-up (allowing for future updates by phone or email of your programming & activities and if there are still questions about future giving opportunities).

Foundation Communication Templates

Initial communication options with your institutional funders to assess their current giving priorities, informing them of your organization's status during the crises or major change, and how to continue the relationship moving forward.

EMAIL TEMPLATE

Dear [PROGRAM OFFICER NAME],

- Include an intro that is as personal as possible to what you know of your program officer – professional and personal info (inquire about family, how is their summer going, etc). Stand out as a grantee that is invested in the relationship on various levels.
- Inquire about the foundation – include acknowledgement of specific initiatives they have undergone, or leadership transition, or any significant changes you are aware of that shows you know this funder and track their activities.

- Update them on your organization – include details of accomplishments, leadership changes, and plans for the future. If confronting challenges of a crisis, be transparent of the issues and how the organization is confronting these issues.
- Checking in about current grant funding (another spot to mention the importance of the funding and how its impacting your organization.) You should also mention your intention to apply for renewal funding (if eligible) and if there is any new information or insights about that current pool of funding or other funding opportunities. Have their funding plans changed from what you know of or what is listed on the website? What should you be aware of to ensure greater success in securing another grant?
- Closing the email make sure to re-iterate the importance of your relationship and leave space for the follow-up (whether they don't respond immediately and you gently circle back, or to allow for future updates of your programming & activities).

Potential Follow-Up Responses:

5. If there are changes to their funding pools (either a transition in priorities or suspending funding activities), make sure to understand their situation and leave the door open for future communications. And of course keep them on your list to monitor future changes that would open the door again to funding.
6. If you are not eligible for funding in the next year, make sure to thank them for the current and past funding and how you are looking forward to working with them in the future. Make sure to be on any general mailing list for future funding announcements. And be in touch with the program officer about any accomplishments of the programs this funder has supported.
7. If the program officer does not anticipate any changes to the your current funding pool, this could be an opportunity to ask about an increased grant amount or funding a new project that fits their priorities (good to wait on this inquiry until after there is some back and forth of information).
8. Set up a phone call!

PHONE CALL SCRIPT

- At the start of the conversation, be as personal as possible to what you know of your program officer – professional and personal info (inquire about family, how is their summer going, etc). Stand out as a grantee that is invested in the relationship on various levels.

“It is so wonderful to be connecting again. How are you? How is your family? How is the foundation? Your other grantees? What are your greatest hopes? Fear? Concerns? For 2020? For 2021?”

- Inquire about the foundation – include acknowledgement of specific initiatives they have undergone, or leadership transition, or any significant changes you are aware of that shows you know this funder and track their activities.

“The project you helped fund last year is still running. We addressed COVID-19 by doing X. What other questions do you have?”

- Update them on your organization – include details of accomplishments, leadership changes, and plans for the future. If confronting challenges of a crisis, be transparent of the issues and how the organization is confronting these issues.
- “It’s been tough. We are still in the midst of our founder’s succession plan and we had to let two staff go. Yet we did plan to plant 10,000 trees in August through our Kenyan initiative. Taking every day one step at a time!”
- Checking in about current grant funding (another spot to mention the importance of the funding and how its impacting your organization.) You should also mention your intention to apply for renewal funding (if eligible) and if there is any new information or insights about that current pool of funding or other funding opportunities. Have their funding plans changed from what you know of or what is listed on the website? What should you be aware of to ensure greater success in securing another grant?
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- “I would love to check in today and know a bit more about your plans for your grantmaking this year and next. We have really been honored to partner with you since 2008 on this work so curious if anything has changed this year in your mind, due to the crisis and such? Do you think we can still apply for a similar size grant to 2019? I really appreciate it as we plan for the remainder of the year and to support our team in the field.”

Variations of responses depending on information gathered from the program officer during your call:

4. If there are changes to their funding pools (either a transition in priorities or suspending funding activities), make sure to understand their situation and leave the door open for future communications. And of course keep them on your list to monitor future changes that would open the door again to funding.

5. If you are not eligible for funding in the next year, make sure to thank them for the current and past funding and how you are looking forward to working with them in the future. Make sure to be on any general mailing list for future funding announcements. And be in touch with the program officer about any accomplishments of the programs this funder has supported.
 6. If the program officer does not anticipate any changes to your current funding pool, this could be an opportunity to ask about an increased grant amount or funding a new project that fits their priorities.
- At the close of the call, make sure to re-iterate the importance of your relationship and leave space for the follow-up (allowing for future updates by phone or email of your programming & activities and if there are still questions about future funding opportunities).