

Tips from an insider on how to keep your funder happy

By Jon Jensen, Program Officer, the George Gund Foundation

Here are a few things most program officers wish grantees would do:

1. Once you've received a grant, ask the appropriate staff person at the granting institution how often they want to hear from you, and what kind of communication they prefer. Do they want monthly telephone updates? An occasional email? Or do they want a final report and nothing more? It will save you and the funder time if you discover this at the beginning of your relationship. Nobody wins if a grantee submits a 20-page report and the funder only needs two.
2. Keep reports separate from new grant requests. At most foundations, these are two separate functions, handled by different people. Including them in one document creates extra work for foundation staff, since they must photocopy the document in order to send it to two separate offices. It also creates the risk that your document will be sent to the reporting section, and your request for a new grant lost in the shuffle.
3. Don't assume that foundation staff is familiar with your organization or project. Foundation staff often process hundreds of requests for grants and reports each year. Your request, as wonderful as it may be, is usually one of many. Each time you submit a report, or make a request, make sure you provide basic background information. Don't ever assume that the foundation will know who you are and why you are writing. Always use any identifying numbers or codes a foundation assigns to you. This will help insure that your correspondence is routed to the right person or file.
4. Be upfront and honest with funders about major changes, or major difficulties in administering a grant and work with them to find satisfactory solutions. Most foundations are open to making changes as long as they are reasonable and staff is kept informed. A good example of how NOT to proceed is illustrated by a Washington-based Gund grantee who got funding to do a research project in Cleveland. The organization encountered one obstacle after another, all legitimate, and were unable to complete the project, but instead of telling us about the situation, they continued to say "We're almost there, we're almost there," until after two years, we had to pull the plug ourselves and exhort them to let the project go and cut their losses. It would have saved everybody a lot of time and money if they had been candid with us when the first difficulties occurred.
5. By the same token, notify foundation staff about major organizational changes in a timely fashion. You would be surprised how reluctant grantees sometimes are to let funders know that they are having major problems or difficulties. A quick letter from the board chair saying, "Our E.D. Joe Smith just resigned, but we've already started a search for his replacement. Just wanted to let you know that we're on the case" will go a long way in reassuring funders that the organization is alive and well despite its difficulties. The worst case scenario here is that the funder has lunch with the Executive Director of another organization and hears second-hand that the grantee organization is on the skids.

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