What's Next ...

If a Funder is Invite-Only?

Mission Match

Do their funding priorities clearly align with your mission and programs?

- Read their mission + recent grants
- Look for language that mirrors your work
- If it is a stretch, move on

Understand Their Funding Criteria

How do they actually give?

- What types of programs do they fund? (general operating, program-specific, capital, etc.)
- Typical grant size
- Geographic focus
- Who they *don't* fund

Review Who They Fund

This is your biggest clue!

- Look at past grantees
- Are they similar in size, scope, and location?
- Any organizations like yours?

If yes, you're a stronger fit

If no, this may not be worth the time

Identify a Connection Path

You need a warm introduction if possible.

- Board members or donors with shared connections
- LinkedIn Connections
- Other nonprofits they fund
- Community Partners

Create a Soft Touchpoint Do NOT ask for funding yet. Start with relationship building	• Send a short intro email • Share a recent impact update or 1-page report • Invite them to an event or program
Ask Smart Questions Position yourself as thoughtful, not transactional	• "We'd love to better understand your current funding priorities." • "Would our work be a fit for future consideration?"
Get on Their Radar Consistency matters more than one email	• Add them to your newsletter list • Send occasional updates (2-3x per year) • Share milestones, not asks • Invite them to follow you on social media • Follow them on social media, like & comment on their announcements
Track the Relationship Don't lose momentum	• Log touchpoints (email, events, calls) • Note responses or engagement • Set reminders for follow-up
Watch for an Opening Invite-only can change	• New staff or leadership • New initiatives or funding areas • Public RFPs or partnerships
Be Ready When Invited Have your materials ready to go	• Program summary & Budget • Outcomes + impact data • Organizational overview • Consider creating a ***"Master Grant Application Template".*** All the information funders look for, organized in one place!