



FUNDRAISING COMMUNICATIONS

Templates and *playbook.*

Email templates, cover letters, and outreach scripts for investor and funder conversations

A project and social enterprise of
ElevateHER Mental Health Support Services Canada

For founder use · Version 1.0 · April 2026

HOW TO USE THIS DOCUMENT

Templates *to adapt.*

This document contains templates for the most common fundraising communications: cold introductions, post-meeting follow-ups, formal grant cover letters, decision-pressure emails, and thank-you messages. Each template is meant to be adapted, not used verbatim. Specific names, organizations, and details should be customized for the recipient.

The voice across all templates is consistent: direct, honest, professional, warm without being effusive. Funders meet with many founders. The ones who get remembered are the ones who say something specific and real, not the ones who say what every other founder says.

Where you see [BRACKETS], replace with specific names, details, or context. Where you see {curly braces}, the content is genuinely optional and should be removed if not relevant.

01. First-outreach emails (cold and warm)

These emails are the first contact with a potential funder. They have one job: to earn a meeting. Not to fully describe MindBank. Not to make the case. Just to make a thoughtful, specific introduction that makes the recipient want to take 30 minutes.

1.1 Cold outreach to a foundation program officer

Use this when reaching out to a foundation you have no prior relationship with, but where MindBank fits their stated funding priorities.

Subject line options:

- A new ethical infrastructure for survivor expertise — would you be open to a conversation?
- Funded pilot in mental health & survivor-voice work — seeking your input
- Quick introduction: MindBank, lived-experience knowledge platform

Email body:

[FIRST NAME], I am writing to introduce a project I've been building over the past year and that has just been funded for its pilot phase. I think it may align with [FOUNDATION NAME]'s focus on [SPECIFIC PRIORITY AREA, e.g., "trauma-informed mental health innovation" or "lived-experience leadership"], and I'd like to ask if you would be open to a 30-minute conversation. MindBank is a digital platform where survivors of mental health, intimate partner violence, housing instability, and substance use experiences are paid to share their expertise — and where vetted service-delivery organizations subscribe annually for ongoing access to that knowledge for staff training, program design, and policy work. It addresses a tension funders in this sector have named for years: organizations need lived-experience input, but the existing channels for getting it are extractive, episodic, and exhausting for survivors. We are operating as a project of ElevateHER Mental Health Support Services Canada, a federally incorporated nonprofit. The Mental Health Foundation of Nova Scotia funded our 2026–2027 pilot phase. We have a working prototype, a five-policy governance suite, and a clear path to subscription-funded sustainability by year three. {If [FOUNDATION NAME] has funded similar work: "I noticed [SPECIFIC GRANT THEY FUNDED] — that same intuition is what drives what we are building here."} Would you have 30 minutes in the next few weeks for a conversation? I can come prepared with the prototype walkthrough, our investor materials, and answers to whatever questions would be most useful for you. With appreciation, Stephanie Atwood Founder, ElevateHER · MindBank hello@mindbank.ca · (902) 814-7883 mindbank.ca

Notes on this template:

- Subject line names the substance, not just "intro" or "request"
- First sentence is direct about the ask: a 30-minute conversation, not a grant
- Second paragraph is the elevator pitch in 80 words
- Third paragraph establishes credibility quickly: NFP, funded, prototype, policies
- The optional middle paragraph differentiates a thoughtful outreach from a mass send

1.2 Warm introduction (referred by a mutual contact)

Use this when someone has offered to introduce you to a funder, or when you're reaching out at the suggestion of a mutual contact.

Subject line:

- [REFERRER FIRST NAME] suggested I reach out — MindBank introduction

Email body:

*[FIRST NAME], [REFERRER FIRST NAME] suggested I reach out to you about MindBank. {Brief context on the connection: "We were discussing the gap in ethical lived-experience platforms, and your work on [PROJECT] came up."} MindBank is a trauma-informed digital platform where survivors are paid to share their expertise, and where service-delivery organizations subscribe for ongoing access. We have a funded pilot through the Mental Health Foundation of Nova Scotia, a working prototype, and a five-policy governance suite that addresses the ethical concerns this work usually leaves unanswered. [REFERRER] thought you might find this interesting because [SPECIFIC REASON]. Would you have 30 minutes for a conversation in the next few weeks? I'd come prepared with the prototype walkthrough and our investor materials. No specific ask attached — I'd value your perspective on the project regardless of fit. Thank you, and please give my regards to [REFERRER]. Stephanie Atwood Founder, ElevateHER · MindBank
hello@mindbank.ca · (902) 814-7883*

Notes:

- Open with the referrer's name — this is what makes it different from cold outreach
- "No specific ask attached" lowers the pressure and increases meeting acceptance
- Closing acknowledgment of the referrer maintains the relationship between them

1.3 Outreach to a major donor / impact investor

Use this for individuals — people who give personally. The voice should be slightly more personal, the framing more about partnership than program.

Subject line:

- A project I think you might find worth knowing about
- MindBank — building what shouldn't have to be built

Email body:

[FIRST NAME], I am writing to introduce you to a project I've spent the past year building and that I think you'll find worth knowing about — whether or not it leads anywhere from a giving perspective. MindBank is a platform where survivors of mental health, IPV, housing, and substance use experiences are paid to share their lived expertise — and where service-delivery organizations subscribe annually for ongoing access. It exists because every other channel for this kind of knowledge is either extractive, episodic, or research-driven in ways that survivors find depleting. {If you have a personal connection: "I founded ElevateHER (the parent organization for

MindBank) from my own lived experience navigating these systems."} We are a project of ElevateHER, a federally incorporated nonprofit, with a funded pilot underway. The vision is for the platform to be largely subscription-funded by year three, with grant funding shifting to innovation only. What we need now is the runway to build year two well — and partners who care about how it gets built, not just whether it gets built. Would you have time for a conversation? I would come with the prototype walkthrough and the investor materials, and the willingness to answer hard questions. With appreciation, Stephanie Atwood Founder, ElevateHER · MindBank
hello@mindbank.ca · (902) 814-7883

Notes:

- Major donors give to founders as much as projects — authentic personal voice matters
- "Whether or not it leads anywhere" lowers transactional pressure
- Phone in signature; some major donors prefer phone calls

02. Post-meeting communications

2.1 Same-day thank-you (after a good meeting)

Send within 24 hours. The goal is to confirm the relationship, deliver promised materials, and keep momentum.

Subject line:

- Thank you for today's conversation

Email body:

[FIRST NAME], Thank you for the conversation today. {Specific reference: "Your point about [SPECIFIC INSIGHT] gave me something to think about — particularly the connection to [HOW IT RELATES TO MINDBANK]."} As promised, I am sending along: · The pitch deck (PDF attached) · The investor backgrounder (PDF attached) · The link to the working prototype: [URL or attached HTML file] {· Any other specific item they asked for} {If they asked specific questions you didn't fully answer: "You asked about [QUESTION] — the answer is [ANSWER]. I should have spoken to that directly in the meeting; my apologies."} {If next steps were discussed: "As we discussed, the next step is [SPECIFIC NEXT STEP] by [DATE]."} {If next steps were not discussed: "I would be glad to follow up at whatever pace works for you."} Thank you again for the time and the thoughtful questions. I'll be in touch. Best, Stephanie

Notes:

- The specific reference is critical — proves you listened. Generic "thank you" emails get filed and forgotten.
- If you didn't fully answer something in the meeting, address it directly
- Don't over-attach. Send what you said you would send. Save other materials for follow-up.

2.2 Two-week follow-up (no response yet)

Use when 10-14 days have passed without next steps. Be present without being pushy.

Subject line:

- Re: [original subject] — quick check-in

Email body:

[FIRST NAME], I wanted to check in following our conversation a couple weeks ago. I know decisions on this kind of project take time, and I am not writing to push for one — just to stay in light contact and to share something brief. {Add ONE specific update: "Our developer reached a milestone on [SPECIFIC FEATURE]" or "We had a productive conversation with [PARTNER ORGANIZATION] about [TOPIC]" or "I was reflecting on your question about [TOPIC] and wanted to share [BRIEF FOLLOW-UP THOUGHT]."} If there is anything additional that would be helpful for your consideration, please let me know. And if the timing is not right for [FOUNDATION NAME] /

for you personally, I would still appreciate knowing — both so I can plan, and because your honest read on the project is valuable to me regardless of outcome. Thank you, Stephanie

Notes:

- Open with acknowledgment that decisions take time
- The single specific update is the value-add
- Explicitly invite a "no" — saves time and is professional

2.3 Decision request (after positive engagement)

Use this when there has been multiple rounds of engagement, the funder is clearly interested, but no decision has been made and you need to move forward with planning.

Subject line:

- MindBank — checking in on next steps

Email body:

[FIRST NAME], Thank you for the ongoing engagement on MindBank. I appreciate the thoughtfulness you've brought to the conversation, and I want to be transparent about where we are on our end. We are now planning year two operations and are needing to confirm what funding we can rely on. {"Our pilot wraps in March and year-two scaling decisions need to be made by [DATE]."} I am writing to ask: is [FOUNDATION NAME / your personal giving] in a position to make a decision on the [TIER A: \$25k / TIER B: \$150k / TIER C: \$500k] ask we discussed by [SPECIFIC DATE]? If the answer is yes, that's wonderful and we'll move forward. If the answer is no — for now, or at all — that's also useful information, and I'd appreciate knowing. {If they raised concerns: "I want to acknowledge the question you raised about [TOPIC]. [BRIEF ANSWER OR ACKNOWLEDGMENT]."} Whatever the decision, thank you for the engagement so far. I would not be writing this if I didn't believe MindBank is something you'd be glad to be part of. With appreciation, Stephanie

Notes:

- This email is harder to write because it asks for something specific. Most founders avoid it, which is why decisions stall.
- Be transparent about your own deadline — more compelling than pressure tactics
- Closing line is genuine confidence, not sales pressure. Use only if you mean it.

2.4 Gracious decline acknowledgment (when they say no)

The relationship is more important than this specific decision. Funders move organizations and change priorities. Keep the door open.

Email body:

[FIRST NAME], Thank you for letting me know, and for the time and consideration [FOUNDATION NAME / you] gave to this. I appreciate the directness. {If they offered specific reasons: "Your point about [SPECIFIC REASON] is one I will hold onto as we develop the work further."} {If no reasons given: "I understand decisions are made for many reasons that may not be visible from outside, and I respect that."} If your circumstances or [FOUNDATION NAME]'s priorities shift in the future, I would welcome a renewed conversation. And if there is anyone in your network you think would be the right fit for this work, I would be glad of an introduction. I'll keep building. If you're ever curious about how the project is progressing, please feel free to reach out. With appreciation, Stephanie

Notes:

- No defensiveness. No re-pitching. The decision is made.
- Asking for introductions in the same breath as accepting the decline is professional
- "I'll keep building" — confidence in your own work, not dependent on their decision

03. Formal grant cover letters

These are formal cover letters for grant applications — typically a single page, accompanying a longer application. The voice is more formal than the email templates, but still warm and direct.

3.1 Foundation grant cover letter — general template

[ON LETTERHEAD: ELEVATEHER MENTAL HEALTH SUPPORT SERVICES CANADA, 69 BRUNSWICK ST, TRURO NS B2N 2G8] [DATE] [NAME] [TITLE] [FOUNDATION NAME] [ADDRESS] Dear [Mr./Ms./Dr. LAST NAME], On behalf of ElevateHER Mental Health Support Services Canada, I am writing to submit our application for funding for MindBank, our trauma-informed digital platform that converts lived experience into professional knowledge for service-delivery organizations. [FOUNDATION NAME]'s focus on [SPECIFIC PRIORITY AREA] aligns directly with what MindBank is building. {"Your support for [SPECIFIC GRANT/INITIATIVE THEY HAVE FUNDED] reflects exactly the gap we are addressing."} MindBank addresses two unmet needs: organizations need lived-experience input to do their work well, and survivors carry expertise that has no respectful, paid, ongoing market. Our platform pays survivors honoraria of \$50–\$200+ per substantive engagement, regardless of whether their final contribution is published. Subscribing organizations submit to vetting and sign ethical use agreements. Every contribution is consent-driven, clinically reviewed, anonymized, and contributor-approved. We are operating as a project of ElevateHER Mental Health Support Services Canada, a federally incorporated nonprofit, with a five-policy governance suite covering compensation, privacy, data protection, equity and anti-racism, and conduct. Our 2026–2027 pilot is funded by the Mental Health Foundation of Nova Scotia. We have a working 20-screen prototype demonstrating contributor and subscriber experiences end-to-end. We are requesting [\$AMOUNT] for [SPECIFIC PURPOSE]. As detailed in the application, this funding will support [SPECIFIC OUTCOMES] and will be reported on in our annual transparency report. I would welcome any opportunity to walk you through the prototype or to answer questions before, during, or after your review. Thank you for your consideration. Sincerely, Stephanie Atwood Founder & Privacy Officer ElevateHER Mental Health Support Services Canada · MindBank hello@mindbank.ca · (902) 814-7883

Notes on this letter:

- One page max. Foundations review hundreds of applications; brevity is respect.
- Second paragraph names the specific connection to their priorities
- Open invitation to walk through the prototype is distinctive — most applicants don't offer this

3.2 Government program cover letter

Government applications typically have stricter format requirements. Check specific program requirements.

[LETTERHEAD] [DATE] [FULL ADDRESS BLOCK FOR PROGRAM] RE: [PROGRAM NAME] — Application from ElevateHER Mental Health Support Services Canada / MindBank To whom it may concern, ElevateHER Mental Health Support Services Canada submits this application to [PROGRAM NAME] for funding to support MindBank, a trauma-informed digital platform that converts lived experience into professional knowledge. Project name: MindBank Project lead: Stephanie Atwood, Founder, ElevateHER · MindBank Project legal entity: ElevateHER Mental Health Support Services Canada (CRA: 723455481RC0001) Funding requested: [\$AMOUNT] Project period: [START DATE] – [END DATE] Geographic scope: [Local/regional/national] Project alignment with [PROGRAM NAME] priorities: [List 3-5 specific bullets showing alignment with the program's stated objectives, citing specific language from the program criteria.] MindBank is a federally incorporated nonprofit project addressing two systemic gaps in Canadian mental health, IPV, housing, and substance use service delivery: organizations need lived-experience input to design and deliver effective services, and survivors carry expertise that has no respectful, paid, ongoing market. Our pilot phase (April 2026 – March 2027) is funded by the Mental Health Foundation of Nova Scotia. Five governance policies are drafted and in review. A 20-screen working prototype demonstrates the platform end-to-end. The full application package includes the project narrative, budget, evaluation plan, organizational background, and supporting documentation. We have also enclosed the MindBank investor backgrounder and pitch deck for additional context, as well as a link to the working prototype. We would welcome the opportunity to provide a prototype walkthrough or to answer questions during the review process. Sincerely, Stephanie Atwood Founder & Privacy Officer ElevateHER Mental Health Support Services Canada · MindBank hello@mindbank.ca · (902) 814-7883

Notes:

- Structured opening block with key facts is standard for government applications
- Reviewers scan for the program alignment section
- Government reviewers often appreciate referencing program criteria language directly
- Be precise on dates, dollar amounts, and legal entity name

04. Partnership and pilot subscriber outreach

These templates are for reaching out to potential pilot subscribing organizations — not funders, but organizations that might pay for a MindBank subscription. The voice is different: less about the founder story, more about specific value to them.

4.1 Cold outreach to a potential pilot subscriber

Use this when reaching out to a service-delivery organization. Goal is to invite them into the pilot at a discounted rate, in exchange for feedback that improves the platform.

Subject line:

- Pilot invitation: lived-experience knowledge platform for [SECTOR]
- A new way to access survivor expertise for staff training and program design

Email body:

[FIRST NAME], I am writing to invite [ORGANIZATION NAME] to consider becoming a pilot subscriber to MindBank — a new digital platform where survivors of [RELEVANT EXPERIENCES] are paid to share their expertise, and where service organizations subscribe annually for ongoing access for staff training, program design, and policy work. I am reaching out to [ORGANIZATION NAME] specifically because {one or two sentences on why this organization fits — their work in [SPECIFIC AREA], their reputation for [SPECIFIC PRACTICE], their stated commitment to [SPECIFIC VALUE]}. For pilot subscribers (3-5 organizations during 2026-2027), we are offering: · Full access at a reduced pilot rate ([X] vs. our standard \$1,200) · Direct input on what content and features would be most useful for your work · Quarterly feedback sessions with our editorial team · First access to new content as it is published · {Optional: "Recognition as a founding subscriber, with your organization's permission"} In return, we would ask for: a signed pilot agreement, monthly use feedback, and participation in an annual reflection conversation about what you have learned. Would you be open to a 30-minute conversation about whether MindBank might be a fit for [ORGANIZATION NAME]? I would walk you through the prototype and share more about what subscribing organizations actually receive. Thank you, Stephanie Atwood Founder, ElevateHER · MindBank hello@mindbank.ca · (902) 814-7883

Notes:

- "I am reaching out specifically because" requires real homework. Generic outreach gets ignored.
- The discounted pilot rate is genuine value, not a fake discount
- What you ask for in exchange (feedback, agreement, reflection) is realistic
- Closing offers specific next step (30-minute conversation)

05. Voice and tone guidelines

5.1 The MindBank voice

Across all communications, the MindBank voice is:

- **Direct, not breezy.** We say what we mean, in clear terms. We avoid corporate-speak, marketing fluff, and phrases like "exciting opportunity," "world-class," "passionate," or "synergies."
- **Warm, not effusive.** We are kind. We thank people sincerely. We do not perform enthusiasm we do not feel.
- **Confident, not boastful.** We describe what we have built. We do not claim more than we have built.
- **Honest about gaps.** We name what we have not yet done. Funders and partners trust founders who do this.
- **Specific, not abstract.** We name specific people, organizations, amounts, dates, and outcomes. Specific is more credible than abstract.

5.2 Words and phrases to avoid

These phrases mark a communication as generic and reduce credibility:

Generic phrase	Specific replacement
"Exciting opportunity"	[Describe what specifically is opportunity]
"World-class team"	[Name the team and their backgrounds]
"Passionate about"	[Describe the work specifically]
"Cutting-edge technology"	[Name the technology specifically]
"Innovative approach"	[Describe how it differs from existing approaches]
"Trauma-informed" (alone)	[Describe what trauma-informed means in your context]
"Centring voices"	[Describe what centring means operationally]
"Synergies"	[Just describe the actual connection]

5.3 How to handle hard questions

Funders ask hard questions. The instinct is to deflect or downplay. The better move is to engage directly. Below are the most common hard questions and how to answer them honestly.

"How do you know there's market demand?"

Honestly: we don't fully, yet. The pilot is partly a demand-validation exercise. What we have is: comparable subscription products in the social services sector that operate at similar price points; conversations with [number] potential subscribing organizations who have expressed interest at the discounted pilot rate; and a clear demand signal from the funder side, where multiple foundations have named lived-experience infrastructure as a priority. By the end of the pilot, we will have validated subscription demand or we will have learned the price point needs adjustment. Either way, we will know.

"What about competition?"

There are adjacent models: lived-experience consulting firms, patient-experience research platforms, survivor-led advocacy nonprofits. Each addresses parts of the same problem. None do what MindBank specifically does — pay contributors at every stage of engagement, vet subscribing organizations, operate under Canadian privacy law, maintain a publicly available governance policy suite. The competitive moat isn't technological; it's the operational discipline of running this work ethically over time. That's a moat that compounds.

"How will this scale?"

Scale is constrained by editorial capacity, not by technology or demand. Each piece of content requires editorial work, anonymization, clinical review, and contributor approval. We can't shortcut these without compromising the model. Our growth target is 50–75 subscribers and approximately 80–100 content products by end of year 2 — substantial but realistic given editorial throughput. Faster scaling would require either more editorial capacity (which costs money) or a degraded standard (which we won't do). We're telling you this because some funders want hockey-stick growth, and that's not what this is.

"What if you, the founder, become unavailable?"

Real risk. The mitigation is in three layers: documentation (the strategic plan, operating framework, and policy suite mean the project can be picked up by others), advisory development (the lived-experience advisory circle in year 2 distributes authority), and eventual separate incorporation (year 3 establishes board governance independent of any single person). In the short term, my unavailability would significantly affect the project. We're building toward a structure where that becomes less true over time.

"What about your EDI commitments — what if you can't deliver on Indigenous engagement?"

The EDI policy explicitly names that as a current gap, not a current accomplishment. As of April 2026, Indigenous consultation has not yet begun. The first commitment is to formal consultation with at least one Mi'kmaw-led organization before scaling any Indigenous-focused work, with the explicit acceptance that the answer might be "not yet" or "not in this form." If we cannot meaningfully engage Indigenous communities through the platform structure, we will name that publicly and adjust scope. We will not perform Indigenous inclusion to make the funder report look better.

"What if you don't hit your subscription targets?"

The model has built-in flexibility. If subscription growth is slower than projected, we can: extend the timeline to sustainability (year 4 or year 5 instead of year 3); reduce editorial scope (fewer training scenarios per year while maintaining reflection pieces); or seek bridge funding from grant sources to extend runway. What we won't do: lower contributor compensation, weaken consent rights, or accept ineligible subscribers to make revenue numbers. The funding ask reflects this — Tier C (\$500k) is structured precisely to handle slower-than-projected subscription growth.

06. Pre-send checklist

Before sending any fundraising communication, verify the following:

6.1 For all emails

- Recipient name is spelled correctly (verify on their website or LinkedIn)
- Their organization name is spelled correctly
- Subject line is specific and substance-based
- All [BRACKETS] have been replaced with actual content
- All {curly brace} optional content has been included or removed (no curly braces remain)
- Specific reference to their work, priorities, or recent activity is included
- A specific next step is requested (a 30-minute call, a decision by a date, etc.)
- Email signature includes name, role, organization, email, phone, website
- Attachments referenced in the email are actually attached

6.2 For grant cover letters

- Letter is on official ElevateHER letterhead
- Date is current
- Recipient name, title, organization, and address are accurate
- Salutation matches their formal title (Mr./Ms./Dr./etc.)
- Specific connection to the foundation's priorities is named
- Funding amount and purpose are specific
- Letter is one page (cover letters longer than one page suggest poor editing)
- Hand-signed if possible (scan or insert signature image)
- All required application materials are included with the cover letter

6.3 For decision-pressure emails

- You're asking for a decision because you genuinely need one — not as a manipulation tactic
- Your own deadline (the reason you need the decision) is real and stated
- You're inviting both yes and no equally
- You haven't sent a similar email in the past 30 days
- You're prepared to receive a no gracefully and not damage the relationship

A NOTE ON USE

Adapt, don't *paste*.

These templates are scaffolding, not scripts. The voice they're written in is the MindBank voice — but that voice has to come through your authentic engagement with the person you're writing to, not through copy-paste.

If you find yourself sending identical emails to multiple funders, you're not using these well. The templates are meant to give you a frame so you can spend your effort on the parts that matter most: the specific reference to the recipient's work, the specific connection to their priorities, the specific reason MindBank fits what they care about.

The funders who say yes to MindBank will be the ones who feel like you wrote to them, not at them. These templates exist to make that easier — not to substitute for it.

— *MindBank Communications Playbook, April 2026*