

Making the Case:

A SAMPLE PHONE SCRIPT FOR CALLING A FOUNDATION

Sometimes scripting out an important phone call, such as that to a foundation program officer, can help eliminate jitters and keep you on task.

Preparation

The most important part of the phone call actually happens before you pick up the phone. Get your ducks in a row. You don't want to be shuffling through a pile of papers or trying to open a document while you're talking.

- Do your homework on the foundation and the person you are calling. Be as fluent as possible in the language of their funding priorities.
- What is your organization's previous relationship with the foundation? Be able to point out past successes for existing relationships.
- Write down for yourself the details of your project. List the reasons it fits with their funding priorities. What is your timeline? What level of funding are you seeking from them?
- List other secured and potential funding, support and/or partnerships for the project. Be prepared to answer questions about future sustainability of the project.

Sample Script

With your prepared notes in hand, use the script below as a great "jumping off point" and add specifics unique to your organization and the proposed project.

You: "Hi, I'm calling from [ORGANIZATION NAME] to see if you might have ten or fifteen minutes to talk about a proposal we'd like to submit to [FOUNDATION NAME]. Is this a convenient time to talk?"

Program Officer (PO): "Sure. What can I help you with?"

You: "I've spent some time on your web site and also attended your forum for grant-seekers last month. I believe that our project aligns with your funding priorities, but there are a few specifics I'd like to go over with you to see if you think we are on the right track. "

OR (if you have a previous funding relationship with the foundation)



“We have been so appreciative of the history of support and collaboration our organization has had with [FOUNDATION NAME]. We are interested in expanding upon that with a project that will bring in corporate and governmental partners and some private support as well. I would love to hear your thoughts on our approach to this project before we get too far down the road in the planning process.”

PO: I’m happy to. Can you give me a quick synopsis of the project, your timeline and what kind of funding you would be requesting?

You: (Describe your project, who it will serve, and why the project matters).

For example: “Our agency is concerned about the rise in teen bullying in our community and we have developed a program to address this issue through after-school programs for teens, in-service workshops for teachers and administrators, and a series of social media spots. We hope to reach 1,000 students in our pilot year in three different high schools and thought that this project might align with your focus on youth health and self-esteem. We are seeking a \$10,000 grant to fund six months of planning work and the initial launch of the program at the start of the next school year.”

PO: “That sounds like something that would fit with our funding priorities. The next steps for you would be:

- Submit a proposal in our December grant round in order for you to receive funding by March.
- Include a list of partners clearly identified with accompanying letters of support and clearly stated measurable outcomes.
- Provide evidence that you have a plan in place for sustaining this program beyond the initial funding.”

YOU: “We are prepared to do all of that. We have a commitment from an individual to provide matching funding in this pilot year and base funding for the next three years. Ultimately we plan to package these programs for purchase by school systems and youth centers throughout the state so that the program becomes self-sustaining.”

PO: “I would encourage you to include a letter of intent from your donor and also to solicit letters of support from school districts and educational organizations who might buy into the program in the future. With those in hand I think you’ll have a strong proposal. Of course, keep in mind that our funds are limited each year and ultimately the foundation board makes the final decision on all requests.”

YOU: “Thank you for your time. May I call you again if I have a specific question along the way?”

PO: “Yes, of course. I look forward to hearing how this project progresses.”

