



FUNDER CALL SCRIPT OUTLINE



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Shining a **light** on the good work you do.

Before each funder call:

- 1) Know your project inside and out
- 2) Know the funder and their funding opportunities inside and out:
 - See details sheets provided
 - See 990
 - See Website
 - See Board list
 - See Foundation Directory profile
 - See Google for news updates
 - See funder's board list (current and past)
 - Check for any possible relationships with board or staff (current/past)
 - Check gift history and operating budget info
 - Check if grants are by invite only so development can ask for a link
 - Study the RFP (eligibility, deadline, etc.)
 - the match of funder with program
 - any timing issues if any (i.e., tight turnaround)
 - how funding timing matches their fiscal year

**Prepare a voicemail script in case a live person doesn't pick up,
15-20 seconds max.
Leave your number
but also say you will call back.
Then do!**

During the funder call:

- 1) Are you accepting applications?
If yes:
explain your mission and program in 25 words or less
(see program angle and timing bullets above)
If no:
Is it that program?
Is it due to ...? [draw them out]
Is it because of a negative on our end? [bad relationship, unpaid invoice, lawsuit, etc.]
- 2) Are we an acceptable fit?
If yes:
Share your project and why you see a fit with their mission
If no:
Ask if they know another funder who would
- 3) Mention anyone in common/have an established relationship with, i.e., a decision maker/keyholder
- 4) What is an appropriate ask amount for a first-time applicant?
Know your total project costs since they may say a percentage
- 5) Is there a better time of year to apply (ex. at start of their fiscal year, for instance)?
- 6) What form do you like applications (letter, online, what attachments)?

**Take good notes!
Good luck!**