





Making a Connection with the First Call

You're phoning a new funder.

How can you increase the odds of getting a grant?

The key is establishing a relationship with a funder before you ever submit. This relationship often begins over the phone. How you handle the first phone call with a funder can make or break your chances of being funded. Follow these tips to make the most of this crucial interaction.

Do your research

Review the foundation's mission and funding guidelines. Ensure your organization's vision is aligned to the vision of the foundation.

2)Timing is key

> Reach out at least 4–8 weeks before a deadline. This shows initiative and gives you adequate time to prepare a submission before the due date

Don't wing it

Sketch out short bullet points to help you keep the conversation focused on the most important ideas. Focus on connections and common ground.

4 Prepare to pivot

to describe a "Plan B" or ever a "Plan C" if the first idea you describe doesn't pique the funder's interest 5)Know your aims

Call with a clear, genuine, and appropriate purpose. Don't put the funder on the spot to ask outright if they will grant your request for funding.

Invite a connection

Invite a funder to see your mission in action. While we practice social distancing, that might include a virtual site visit or sending photos.

7) Follow up

call or meeting. If the funder didn't invite a proposal but was open to learning more, send an info packet, then plan to follow-up again.

Assess success

the funder encourages a submission, accepts an invitation to meet, provides guidance for a stronger proposal, or suggests other funders you can approach. Well done!





