

# Tips for Approaching a Foundation

## Purpose of Tips for Approaching a Foundation

Building relationships with foundations, when possible, is key to fundraising success. The initial approach of making a call to someone you haven't met before (aka "cold calling") can be intimidating as you want to make a great first impression. To help organizations stay on message during that first call, a sample phone script can be used. Please see below. We recommend role playing and practicing this script with a colleague. The script is a guidepost; adapting to individualized messaging is a necessity.

## Sample Phone Script for Approaching a Foundation

"Hello. This is Sally Sample, and I work with Sample Organization. May I speak with X?" [if you know the name] or request to speak with a program officer, grants manager, giving manager, or someone who works with grant applications if you don't know a name within the organization.

Once you are connected to an individual who manages grants, you can try one or more prompts:

For this example, a counseling program will be used.

- "I've noticed that you fund counseling programs, and we provide counseling and education services to children and adults." If the funding prospect has a special population they reach, you can modify the script to include the special population – in example, veterans: "I've noticed that you fund counseling programs, and we provide counseling and education services to veterans." If the funder is from Texas, you might mention the geography of your organization. If the prospect isn't from Texas, you might say, "We provide these services in [region]." Describe the region if the funder is not familiar with the area.

- “Our organization has a [fill in program/project] that we feel aligns with your current funding priorities, and I wondered if I could chat with you about it to see if you feel like it is a good match?” Then quickly share a few highlights of the program/each program with the prospect. This is a great opportunity to give your elevator speech.
- If a funder accepts applications year-round, you can ask the prospect: “I noticed on your website you accept applications year-round. Is there a best time of year to apply?” Another question: “When does your board meet to review applications?”
- If the conversation goes well and there is a possible match, be sure to ask for next steps in the process – does the funder require a letter of inquiry? Who is that addressed to? If the person you spoke to is a decision maker, address the letter to that individual. If the person you spoke to is a staff member, you can reference your conversation with that staff person in your letter. Is there an application? Find out due dates and where you can access the application.
- If there doesn’t seem to be a match, thank the prospect. Even if the prospect isn’t right for you now, consider sending a thank-you note to thank them for their time. Funding priorities change with foundations, and you may want to return to ask about funding later.

### Approaching a Foundation Resources (A Selection from Internet-Based Research)

“Call Foundations First: Win More Grants!”

<https://www.amyeisenstein.com/win-more-grants/>

“How do I approach a foundation and build a successful grantee-funder relationship?”

<https://grantspace.org/resources/knowledge-base/approaching-foundations/>

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### About Methodist Healthcare Ministries of South Texas, Inc.

At Methodist Healthcare Ministries we view capacity building as a process of organizational strengthening. We work alongside our funded partners and community organizations, building upon their assets to increase their impact in community and improve health equity. Capacity building is an investment in nonprofits' abilities to be more efficient, effective, and sustainable.