

Phoning funders: An exercise

Adapted from *Grassroots Grants, Second Edition: An Activist's Guide to Grantseeking*
by Andy Robinson, published by Jossey-Bass, 2004

The purpose of this role play is to help you:

1. Learn to describe your work clearly and briefly, leaving out unnecessary details.
2. Negotiate a next step with the funder.
3. Increase your comfort level.

Dramatis personae (Shakespearean for "the parts to be played"):

1. **The grantseeker**
2. **The foundation officer:** a staff member whose job is to read and screen proposals, meet with grantseekers as time allows, do "background checks" on applicant groups, and make recommendations to the final decision-makers: typically the foundation board.

Find a partner to work with in person or by phone. If you're working in person, turn your chairs back to back so you can't see each other (this simulates a phone call). One person plays the grantseeker; the other, the foundation officer. Assume that you've completed your preliminary research and identified this funder as a good match. (If you need more specifics about the foundation, see Exercise 6.2).

If you're playing the grantseeker, take a few moments of silence and ask yourself, "What's my goal with this phone call?" When you're ready to start, make the phone ring (yes, you can say "ring, ring") and your partner will respond by answering.

Over the next **three minutes**, your job is to:

- a. Introduce yourself.
- b. Make sure you're talking to the right person ("I'm working on a community garden project in my urban neighborhood in Cleveland; who would be the best person to speak with?")
- c. Find out what, if anything, the foundation officer knows about your work or your issue.
- d. Describe your organization and your project *briefly!*
- e. Ask a question or two to gauge the funder's interest.
- f. Complete the call by getting the grantmaker to agree to a next step; options include:
 - **Summary** – review a summary or introductory letter (letter of inquiry)
 - **Proposal** – review a full proposal
 - **Meeting** – schedule a meeting
 - **Leads** – suggest other sources of funding (especially if the grantmaker decides your program is not a good fit)

To "debrief" this exercise:

1. The grantseeker goes first. S/he says *two things about the phone call that went well and one thing that could have worked better, with an idea for how to improve it.*
2. The foundation officer goes next, following the same format.

After debriefing, switch roles and start again.