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Making the Call

by Sarah S. Brophy

A CRITICAL PIECE of proposal writing isn't writing at all, it's talking. If you haven't called to speak to a foundation officer or program director before preparing a proposal, you risk wasting your time writing it and someone's time reading it.

Most of our initial donor information comes from print and electronic publications that could be out of date, or worse, gathered without the donor's input. It could be grievously wrong, or just slightly. You could be applying for the right program with the wrong audience, or the right project and the wrong amount of money. A discussion with their staff will help you craft a more responsive and complete proposal, and improve your chance of success. This call is not for reconnaissance; that's done during preliminary research. Collect all the information you can; then call the foundation only if you see no reason not to apply, or if you have a question about a specific requirement that you cannot answer through your own research.

Before picking up the phone, practice your elevator-ride speech. This survivor of the early days of venture capital is your thirty-second sales pitch. Develop and practice it before making the call—write it out in case your courage fails you or your mind goes blank.

Tell whomever answers: "I'm Sarah Brophy from the Carlisle Historical Society. I've read your guidelines and Form 990, and visited your website. I believe our project matches your interests, but I would like to be sure before I submit a proposal. May I speak with a program officer about the appropriateness of the project and its components?"

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Then they know you have done your homework and will let you past the front line. When you reach the officer explain: "I'm Sarah Brophy from the Carlisle Historical Society. We are considering applying to Tacoma Foundation for support of a community restoration project for our historic graveyard. We work with professional stone conservators to train high school students, adult volunteers and the Town's department of public works in identification, assessment and care of these 18th century burial markers. Seventy-five percent of the stones have suffered from weather and vandalism and lie broken or buried in the graveyard. Our five month training and conservation project will record and restore 81 stones, provide volunteers and town staff with training for ongoing maintenance, cultivate adult supporters of historic preservation, and encourage students to value and protect this site."

If you are pretty sure how much you will ask for, say "The project costs \$xxxxx and we would like to ask the Tacoma Foundation to consider \$xxxxx in support of this project." If you are not quite sure the project is appropriate, say "Do you have time to speak with me about the appropriateness of this project?"

You will have answered the who, what, when, where, how and why. Now it's their turn to ask specific questions and then recommend whether or not you should apply, and how to apply. (Of course this means you have to understand the project entirely before making the call, and have a backup project if you miss the mark.) Be ready to answer questions like:

- Which of your personnel would be involved?
- How much it will cost?
- What are the goals and the outcomes?
- Can you replicate it?
- Would it be better done with a partner?
- Has anyone else done this? (Why or why not).
- Why are you the best to do this?
- If it involves construction, know all the permits needed, start and end dates, estimated amounts, any contingency fund, and will you have to borrow?
- Whom else are you asking to fund this?

It's okay to ask how competitive the project might be. They'll explain that every pool is different, but that generally this type of project scores well (or does not). They have no time to waste reading ill-fitting proposals so they will give you a fair answer. If the answer is "You are certainly welcome

to apply, but . . ." don't. If they encourage you to apply, do confirm the dates and the contact name.

Foundation officers and government program directors are in the business of finding good ways to share their wealth. They want the best matches possible. Your intelligent, efficient presentation is an excellent introduction for your organization. Even if this project doesn't work out, your professionalism will be appreciated and will help you next time you call.

Remember to thank them for their time. They work hard too, you know.

