**Donor Communications 101**

*After you have created a list of potential donors it is now time to pick up the phone to make those first connections…*

**Things to remember:**

1. Most decision makers have a “gate-keeper” to help in the screening process. Always work to build a relationship with the gatekeeper!
2. You might be transferred to a voicemail system. Be prepared to leave a concise/generally specific message. (We will work on this later!)
3. Be prepared to answer questions the decision maker/donor might have about your organization or project. Keep reference documents close to you and be prepared to email them to a donor upon request.
4. Always thank the gatekeeper and potential donor for their time…regardless of the outcome!

**Starting the conversation:**

1. Greeting the gatekeeper and getting connected to the decision maker:
   1. Good morning. My name is \_\_\_\_\_\_\_\_\_ with \_\_\_\_\_\_\_\_\_\_organization. How are you today? I would appreciate it so much if you could connect me with the person at your business/organization/place of worship that makes decisions about community support/charitable giving in the community.
   2. Good afternoon, I am hoping that you can connect me with the program officer or director for \_\_\_\_foundation/charitable giving program.

1. Starting the conversation with the program officer/donor. Provide a BRIEF overview of why you are calling and how they can help.
   1. **Intro:** Good morning, Mr/Ms \_\_\_\_. Thank you so much for taking the time to speak with me today. I won’t take much of your time. My name is \_\_\_\_\_ and I am (position/title) with (name of organization). I’m not sure if you are familiar with us but, we are a local non-profit that: (state mission).
   2. **Statement of Need:** Right now our community is facing a major need (description of your specific need) and we are turning to community members like yourself to see if you would be willing to partner with us.
   3. **Connecting with Foundations/Grant Program Officers:** I am calling/writing on behalf of (name of organization), a non-profit located in (city, county, state). After reviewing your foundation’s priority areas online, we feel that we may have a project that aligns with your areas of interest. We would love to have the opportunity to share our project with you before moving forward with the application process to see if you feel we might be a good match.
2. Common donor questions:
   1. How long has your organization been in existence?
   2. Is this an existing project/program or is it new?
   3. What is your total organization and/or project budget?
   4. How much of the funds needed have you raised?
   5. Who are key community partners that support this project?
   6. Who will this project impact?
   7. How will you measure and report the project impact?
   8. Are you requesting dollars for purchase of equipment?
   9. Are funds for project materials/supplies or for staffing?
   10. Who will oversee this project?
   11. Will funds offset this person’s salary (another way of saying are you supplanting this salary)?
   12. Who is on your board and how are they engaged? (Diversity of board and do they all contribute financially?)
   13. What’s your timeline for this project?
   14. If we are unable to fund your entire request, will you be able to complete this project with only partial funding from us?
   15. How will you sustain this project/program after the initial grant/contribution dollars are gone?
   16. Faith based organizations may want to know if your organization is associated with a particular denomination or if you are willing to refer clients to their place of worship.
3. Ending conversation with a foot in the door.
   1. Thank you so much for taking the time to speak with me today. I appreciate you clarifying your organization’s/foundation’s/place of worship’s areas of interest and funding priorities.
   2. We are excited to have the opportunity to submit a request for funding and look forward to submitting our proposal (deadline date).
   3. If you have any recommendations for us as we move forward we would love to connect with you again.
   4. We would love the opportunity to be considered for inclusion in your place of worship’s annual budget and would be happy to meet with the outreach/allocation’s committee to define what that partnership might look like.

***If the donor does not believe they are interested/able to fund your current request***

1. Although this particular project doesn’t appear to align with (name of donor) priorities, we appreciate the opportunity to discuss it with you and we look forward to the possibility of submitting a proposal for a different/more applicable project at a later date.
2. We appreciate your feedback and realize that this particular project isn’t a great fit for (name of donor’s) current funding priorities. If you know of anyone in the community that might be interested in partnering with us, please let us know. Thank you again for taking the time to speak with me today and for the wonderful work your foundation/business/place of worship is doing to strengthen our community.