



JVA CONSULTING, LLC
partners in community and social change

Sample Script

Note: the caller should adjust this script to reflect his or her own style and understanding of ACE Mentor. Conversations should be sure to reference past contact/support, if relevant.

Hi, (Foundation representative).

This is **Name** calling on behalf of ACE Mentor in **NAME OF COMMUNITY**. I am calling to confirm information I have about the **Knowledge Foundation**, and hoped that I might take a few minutes of your time. Is that okay? Great!

OR

This is **Name** calling on behalf of ACE Mentor in **NAME OF COMMUNITY**. I've reviewed the foundation guidelines and I have a few additional questions to make sure that I fully understand your process and to make sure that we are a good fit for your foundation. Do you have a few minutes to talk with me now? Great!

[Determine which questions are appropriate. Do not ask questions when the information is clearly posted elsewhere. You may ask to confirm the accuracy of what is posted, but demonstrate that you have done your homework.]

1. I've reviewed the foundation's information on your Web site. Is this information current or is there anything else that is not reflected on the Web site that we should know about before applying?
2. I wanted to confirm that the next proposal deadline is **[date]**.
3. Will the foundation consider funding new projects and new grantees this year?
4. Do you have 2009 guidelines? How can I access them?
5. Does the foundation fund statewide in **NAME OF STATE** or do you have more specific geographic target regions?
6. Is the foundation still focused on **[foundation mission/focus area here]**?

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I understand from your guidelines that the foundation is committed to [summary of foundation focus that aligns with ACE Mentor work]. I wondered if I could tell you a little about our organization (or program) to make sure that we are a good fit with your foundation.

[Provide brief overview of the organization and any particular project being pitched. Adapt emphasis to align with the mission of the foundation.]

Let me give you an example of what we do. [Insert example here that is a good fit with the specific funder. Use concrete examples.]

I am proud of the accomplishments of ACE Mentor, like, [insert example(s) here] that demonstrate the effectiveness of ACE Mentor's work.

I believe that ACE Mentor is a good match with the Knowledge Foundation's mission. Do you think that ACE Mentor is the kind of organization the foundation might support? We would like to submit a request of \$XX,XXX to support [specific project, if relevant]. Does this fit within the grant range that the foundation might consider? What do you suggest my next steps should be?

Foundation Representative, thank you so much for your time.

After the call...

- Write a hand-written thank you note to the person you spoke to on the phone to again thank him or her for taking the time to speak. Consider including appropriate information about ACE Mentor based upon your call.
- If the foundation representative asked for additional information, send it out as soon as possible; within 24 to 48 hours is best.
- If you are encouraged (or at least not discouraged) to apply, refer to your conversation in the cover letter with the application.
- If you get a voice mail, don't despair and don't give up. Give the foundation representative 10 days to call back and then try again. When calling multiple times, leave your email address as well, and ask the program officer or contact to let you know a good day and time to call. If a phone call is not likely to happen, consider sending an email with questions and attach information about ACE Mentor.