writing for green

Tailored Interview Guide Worksheet

Use the steps below to build a preparation guide before meeting with a potential funder. This will help you anticipate the kinds of questions you might be asked.

Step 1: Lead with What the Funder Cares About

Review your funder research and identify what matters most to them. Look at their website, past grants, and mission statement for clues. Then choose the opening approach that best matches their focus:

- ☐ **Outcomes and metrics:** if the funder is data-driven (e.g., open with graduation rates, number of people served, or measurable community impact)
- ☐ **Stories and relationships:** if the funder is community-focused (e.g., open with a brief story about someone your organization has directly impacted)
- ☐ **Your unique approach:** if the funder is innovation-oriented (e.g., open by highlighting what makes your model different from other organizations doing similar work)

Step 2: Identify Your Key Talking Points

List your most important talking points and rank them in order of priority. Ask yourself: if time runs short, which points are non-negotiable?

1. …
2. …
3. …

Step 3: Anticipate Questions the Funder Will Ask You

Put yourself in the funder's seat. Based on your research into their priorities and funding focus, think through the questions they are likely to ask your organization.

- ***Example:*** *How does your work align with our foundation's current priorities?*
- …
- …
- …
- …
- …
- …

Step 4: Know What to Leave Out

Not everything needs to be said in one meeting. Identify topics that could derail the conversation, take up too much time, or are not relevant to this particular funder's priorities.

- …
- …
- …

Step 5: Define Your Single Most Important Takeaway

If the funder only remembers one thing from your conversation, what do you want it to be? Write it down in one clear sentence and make sure your entire pitch points back to it.

Example: *"YouthForward is the only organization in Dallas providing free, year-round mentorship to at-risk youth, and the results prove it works."*

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