



ROOSEVELT FOR GENERATIONS CAPITAL CAMPAIGN A GUIDE TO *MAKING THE ASK*

RELATIONSHIPS FIRST

- Keep in mind, this isn't just about "getting money," it's about connecting a friend, colleague or classmate to an organization you care deeply about
- Passion, integrity and trust are the biggest factors
- Top three motivators for why people give:
 - Someone asked
 - Relationship with asker
 - Want to be a part of the work – Roosevelt is important to them too!

STEP ONE: THE INTRO

- Purpose: introduce campaign/project and request a meeting
- Can be email, phone call or letter
- Keep it brief!
 - Thank for support of Roosevelt
 - Tell them you would like to talk about a project you're working on – a project that is important to you and that you believe may also be important to them
 - Be transparent this is about fundraising and their support
 - Request a time to meet – stress the need for face-to-face
 - Ex: *Hi _____. Casual conversation - opening question like "How is your week going?" I'm working on a project for our alma mater, Roosevelt that I'd like to share with you. We're raising funds to update the multi-purpose field (track and field) and reimagine the library. Do you have time in the next couple of weeks to join me and _____ for a cup of coffee/glass of wine/ Zoom call to share details and how you can get involved?*
- Partner and pair (two volunteers are even better than one)

STEP TWO: PREPARE

- Think about why you support Roosevelt
- Gather information about prospect
- Review case brochure and practice talking points
- Know the amount of the ask
- Know amount raised to-date for the campaign
- Be enthusiastic! This is about giving someone an opportunity to support a high school you both care about!

STEP THREE: THE VISIT

- Open
 - Volunteer leads casual conversation to develop comfort; typically includes brief discussion of events, family, etc.
 - State goals of meeting: “We are here today to discuss a campaign for Roosevelt”

- Engage & Share Plans
 - Thank for past support of Roosevelt
 - Find out what is important to donor – Listen!
 - Ex: What have you enjoyed supporting most at Roosevelt? (facility upgrades, scholarships – let person talk)
 - Ex: What are you most proud of related to your education at Roosevelt and support of Roosevelt today?
 - Share information about the Roosevelt campaign – walk through the case brochure and use as a guide:
 - We’ve made plans to address current facility needs and innovative ways of learning with updates to the multi-purpose track and field and a reimagined library.
 - Track & field are two of Roosevelt’s most heavily utilized amenities. We plan to completely reconstruct it so it is safe for the 2000+ students who use the field each year (Band, PE, soccer and football)
 - It’s time to ensure the library better supports 21st century learning with a Learning & Innovation Center designed to foster small group projects, collaboration and critical thinking.
 - The campaign and these projects are critically important to Roosevelt’s future ability to remain one of the premiere high schools in our state.
 - Roosevelt *outperforms its resources* year after year but this is not sustainable without our support
 - Make sure the donor understands the project and can ask questions

- Ask
 - We need to raise \$3 million to bring plans to fruition
 - We have already raised \$_____, so we have a great start
 - We’re hoping you will consider a donation to this important project. What kind of impact would you (or you as a family) like to make? Your gift inspires others to also give.
 - We have an ask amount in mind – would you like to hear? (Then share specific amount) OR We would like you to consider a donation in the amount of \$_____ to support the Roosevelt Campaign (it can be paid over up to three years)
 - Is that something that would feel meaningful to you / Will you be able to help us

- Be quiet – wait for a response.
- Close
 - Thank them for time and interest
 - Determine next steps/follow-up
 - Wrap up casually – continue the relationship

STEP FOUR: FOLLOW-UP

- Send a handwritten note or email thank-you
- Send any additional information discussed
 - One page flyer
 - Pledge form
 - Answers to questions
- Determine date for follow-up if needed
- Report back to campaign consultants and chairs

TIPS FOR RESPONSES

YES

- Thank the donor
- Share that you will send a pledge form (via email or mail)
- Discuss payment method – invoice, etc.
- Depending on gift size, may discuss recognition opportunities (but nothing is promised at this point)
- Thank them again!

MAYBE

- Would they like more information?
- Would a tour be helpful? (If possible given pandemic)
- When is a good time to follow-up?
- Keep the door open and confirm next steps
- Thank them for their consideration

NO

- See if there is an opportunity for follow-up
- Remember that “no” may mean:
 - Not right now, not for that amount, not for that program, not until I find out more information, not until I feel more comfortable, not until I am able to see who else is supporting the campaign
 - Try to assess which “no”
- Thank for time and consideration