



ROOSEVELT FOR GENERATIONS CAPITAL CAMPAIGN

CAMPAIGN CABINET MEETING

May 5, 2021 // 5:30 pm via Zoom

In attendance // David Adelman, Suzanne Reynolds Arnold, Adam Claypool, Mollie Cooney, Jackson Dahlquist, Brian Gentry, Rose Green, Jack Hilmes, Jennifer Hilmes, Laura Leonard, Kaye Lozier, Kate Mead, Bill Newland, Jackie Norris, Mary O'Brien, and Janie Wine
Consultants // Connie Isaacson and Nikki Syverson

MEETING NOTES

WELCOME & SHARING

Chair Laura Leonard welcomed the cabinet and Boys Track Coach Laura Schwendiger. Both the Roosevelt boys and girls teams won the conference track meet the day prior. Coach "Schwenny" said she is proud of the team's execution and teamwork. She stressed the importance of building a supportive culture and shared that the team's theme for the year is HOPE: Harness Our Power Everyday. Coach Schwenny also stated that she loves coaching at Roosevelt because "Roosevelt kids look like the rest of the world looks."

FOUNDATION UPDATE

Foundation Board President Rose Green shared that Principal Biggs will no longer be at Roosevelt after the school year concludes. The district will begin a national search immediately and will keep the Foundation apprised of its timeline. The Foundation is confident it can still execute on all of its projects and stressed the need to lean-in to other faculty and staff for support during the interim. The cabinet was also reminded that Roosevelt is more than just one person and that the school's legacy and tradition remains strong.

Jackson Dahlquist shared that the Rider Cup golf tournament is scheduled for May 21 at Waveland Golf Course and spots are still available for those who wish to participate.

PROJECT UPDATE

Jackie Norris stated that May and June are critical months for fundraising to keep the project timeline moving forward. Architectural drawings need to begin soon in order to deliver a multipurpose track and field by August 2022. Rose Green shared that the Innovation & Learning Center session with students and staff was very helpful and expects conceptual design from the architects in approximately two weeks.

FUNDRAISING PROGRESS TO DATE

Chair Brian Gentry shared an update on campaign fundraising progress. Currently, \$828,500 has been raised with \$171,500 to go to get the campaign to its first million. Leadership and major gifts continue, however the cabinet is now being mobilized to make calls at \$10,000 and above. Looking at our campaign benchmark, \$3 million of the \$5 million goal should be raised by the end of July. With that in mind, May and June are critical months for making calls and securing commitments for the campaign.

Brian also shared a major donor gathering is being explored. The idea is to have a confirmed leadership donor host a small house party for others considering leadership gifts.

Lastly, Brian gave an update on grant requests. A proposal requesting \$250,000 from the Dahl Trust was submitted at the end of March. Cabinet members have had productive calls with Paul Tyler who is supportive of Roosevelt and its efforts. A Polk County Development Grant will be submitted in July with a \$250,000 ask. David Adelman had conversations with both Matt McCoy and Angela Connolly to cultivate the ask.

LEADERSHIP GIFT & MAJOR CALL REPORTS

- Suzanne Reynolds Arnold: Ready to make calls. Will connect with Jim Wine on Ghrist strategy
- Adam Claypool: Ready to make calls
- Mollie Cooney: Ready to make calls
- Rose Green: would like a partner on any ask
 - Jackie will help with Beodings & Levy
 - Suzanne can help with Cerne & Lorenzen (suggestion for higher ask of Lorenzen)
- Brian Gentry: Ready to make calls
- Jack & Jennifer Hilmes: Ready to make calls and will send ISC additional names to add to their call list
- Kaye Lozier: met with Fred & Charlotte Hubbell who asked tough questions but also committed to making a gift. Working on other leadership prospects
- Bill Newland: setting meeting with Mike & Debbie Hubbell who are very energized about campaign; he expects a substantial gift from Graham Cook. Bill can ask Billie Ray
- Jackie Norris: asked for help with Dave Everett and Mary O'Brien volunteered to assist
- Wine: Ready to make calls; suggested Chuck Betts as part of Ghrist strategy

Connie also reminded the cabinet of the talking points for Making the Ask which were shared earlier this year and will be posted on the Cabinet portal. More detailed, tailored talking points can be created by ISC for major and leadership gifts. Kaye Lozier stressed that based on the call with the Hubbells, savvy donors want to know the amount contributed by the board and cabinet as an indicator of commitment. The amount raised to-date is also important for donors to understand how successful the campaign will be.

Rose Green offered to connect cabinet members with faculty members to aid in donor meetings.

SUBCOMMITTEE FOLLOW-UP

- Prospect List Subcommittee: the committee has met and is making progress!
- Class Gifts Subcommittee: Jackie Norris sent an initial plan to a small group for feedback then will report back.

CABINET MEETING TIME

Connie Isaacson shared that we are trying to find a meeting time that works well for the cabinet and encouraged all to take the poll regarding future meeting times.

NEXT STEPS

Laura Leonard reiterated that these next two months are very important and encouraged cabinet members to make their calls and continue to think of prospects with a strong connection to Roosevelt who also have capacity to give to the campaign.