

Making the Ask - Role Play Scenarios



Scenario A (First Time Donor): You are meeting with a prospect who has never made a gift to your institution. They have been identified by your research team as someone who has significant capacity and has been very involved as a volunteer and donor at various nonprofit organizations. You're going to ask them for a \$250 annual fund gift, but you also want to learn more about them and their potential interest and capacity to make larger gifts in the future.

Scenario B (Recent Grad Leadership Gift): You are meeting with a young alumnus/a who graduated 5 years ago. They were a senior class gift committee member and a student caller for the annual fund. They have given modestly but consistently each year since their graduation. Your institution's annual fund leadership gift society grants discounted membership for young alumni (\$100 x # of years since graduation). You are going to ask them to become a member with a gift of \$500.

Scenario C (Lapsed Donor): You are meeting with an alumnus/a who graduated 18 years ago from your institution. They are a lapsed donor who used to be a member of your annual fund's leadership giving society. Their last gift was 5 years ago. You are not sure what caused them to stop giving but plan to ask them to renew their support and rejoin the gift society with a gift of \$1,000.

Scenario D (Loyal Donor Upgrade): You are meeting with an alumnus/a who graduated from your institution 12 years ago. They have been a consistent donor of \$1,000, which has qualified them for membership in your institution's annual fund leadership gift society at the "Associates" level. You're going to ask them to increase to \$2,500 this year, which would qualify them to be recognized at the "Benefactors" level.

Scenario E (Parent Council Invitation): You are meeting with a couple who are new parents at your institution. They have been identified through your research as good prospects to join your school's Parent's Council. You know that they have been actively involved at their child's previous institution, both as volunteers and donors, and they have another child at that institution currently. This is their first meeting with anyone at your institution. You are planning to ask them to join the Council and make a gift of \$5,000.

Scenario F (Reunion Multi Year Pledge): You are meeting with an alumnus/a who graduated 25 years ago. This year marks a milestone reunion for their class. They have a history of sporadic giving history as well as some occasional event attendance. You are going to ask them if they would like to become a member of their class's 25th Reunion Gift Committee and also make a \$10,000 pledge on behalf of their reunion, which can be payable at \$2,000 per year for 5 years.

Scenario G (Current Use Scholarship): You are meeting with an alumnus/a who graduated from your institution 42 years ago. They had a successful career and recently sold their business and retired. As a student, they received a significant scholarship that enabled them to attend school. In a meeting with a former gift officer from your institution, they indicated that they there are not prepared to endow a scholarship at this time since your institution requires a minimum of \$100,000 for new endowed scholarships. However, you think they might be interested in creating a "current use scholarship" in their name. Your institution's policy requires a commitment of \$50,000 to the annual fund for current-use scholarships, which can be paid in installments of \$10,000 over 5 years.