

**Exercise: Practice making an ask (in person) with an individual donor**

You’ll be doing this in groups of 3 or 4.

Roles:

* Donor (one or two people)
* Staff person
* Board member or volunteer

The Exercise

1. Prep – 3-4 min

* Staff member & board member/volunteer meet in breakout to prep
* Donors stay in main room for group prep

2. Donors will be sent into the breakouts to join the solicitor teams, where you’ll have 10 min to carry out the solicitation, and 2-3 min to debrief with each other.

3. Come back to large group for debrief of the role play.

Here’s background on the donor:

**Their giving history:**

2016 - $100

2017 - $200

2018 - Did not donate

2019 - $500

2020 - $500

No one on the board or staff of your organization personally knows them, what their connection to the issue or your organization is or what motivates them to give.

Other information on your campaign and set-up for the meeting

**Fundraising goal for this campaign** - $50,000

**Your goal with this donor:**

* Get to know them better
* Ask them to increase their gift this year to $1,000

**Prior to the meeting:**

You had an email exchange with them, asking for a meeting, and they agreed. You also mentioned in the email that you would be asking them to consider increasing their gift to $1,000.

**Preparing for the Meeting:**

If you are put into a breakout room to play roles of staff & board members:

Decide on what you’re raising money for, eg, a specific campaign you’re working on, or simply a renewal of their annual support for the organization.

Talk briefly about what you want to say about the campaign, and which one of you will make the ask for a larger gift.

What will you ask the donor?

Eg: “how did you first learn about our work?” or “what is your connection to/relationship to the issues we work on?”, “what do you think about our approach to the problem?” or “is there anything else you’d like to hear more about?”