

The Cultivated Alumna (Group 1)

Background:

Mrs. Casey, a wealthy and accomplished university alumna, has been cultivated as a potential major donor for several years. Despite her strong connection to the university, she has yet to contribute financially. However, she has demonstrated her generosity by supporting other organizations with significant gifts.

The university urgently needs a new Simulation Lab (Sim Lab) to enhance its programs and provide students with cutting-edge training facilities. The project requires \$1.5 million in funding, and Mrs. Casey's philanthropic capacity aligns perfectly with the scale of the need. She has agreed to meet for lunch, providing an opportunity to make the ask.

Objective:

To secure Mrs. Casey's support for the \$1.5 million Sim Lab by connecting the university's need with her values and motivations as an alumna and philanthropist.

Questions to consider

How will you establish a warm and engaging tone at the start of the meeting to build trust and rapport?

How will you personalize the conversation to align the Sim Lab project with her past contributions to other organizations and her values as an alumna?

How will you demonstrate the tangible and transformative impact of her gift on students, the university, and the community?

How will you create space for her to share her thoughts, concerns, and motivations during the conversation?

What compelling alternatives or phased giving options will you present if she hesitates about the \$1.5 million amount?

How will you leave her with a sense of deep appreciation and excitement for the potential partnership, regardless of her immediate response?

Foundation Engagement (Group 2)

Background:

The Blanchard Foundation is widely recognized for its commitment to helping children succeed, with a strong focus on addressing systemic barriers faced by underserved youth. Over 50% of your university's students are Pell-eligible, many of whom struggle to afford the cost of higher education. To address this need, you have established the "Making it to the Finish Line" Scholarship, designed to provide target financial support to ensure students can complete their degrees.

In the past, you have approached the foundation for assistance, but your efforts were unsuccessful. This time, you are presenting a refined request that directly aligns with the foundation's mission: to specifically support students who were foster children. These students face unique challenges, including limited financial and emotional support systems, making them an especially vulnerable population.

Objective:

To secure a commitment of \$500,000 per year for the next five years from The Blanchard Foundation to fund scholarships for former foster children pursuing their degrees.

Questions to Consider

How will you open the meeting, and who will you take with you?

How will you acknowledge The Blanchard Foundation's previous contributions and demonstrate your respect for their mission and impact?

What specific data, stories, or visuals will you use to immediately highlight the critical needs of former foster children and the unique alignment with the "Making it to the Finish Line" Scholarship?

How will you establish a tone of collaboration and shared purpose from the outset, connecting the scholarship program to their foundation's mission?

What specific elements of the foundation's commitment to helping children succeed and addressing systemic barriers will you reference in your proposal?

How will you reinforce the potential impact of the foundation's support?

What evidence or projections will you share to illustrate the tangible difference this scholarship can make for former foster children in terms of retention, graduation rates, and life outcomes?

How will you close the meeting?

The Unmotivated Board Member (Group 3)

Background

You have a Board member who is highly vocal and influential in Board meetings. However, their financial contributions to the University have been minimal over the past three years. Recently, it was publicly reported in the media that this individual made a significant donation to another non-profit organization. Despite this, the Board member has expressed a strong desire to continue serving on the Board and is up for re-election for another term.

To address the situation, you and the Board Chair have scheduled a meeting with the Board member. During this meeting, you aim to discuss their continued service on the Board and clearly request a \$50,000 gift to align their financial commitment with the expectations of Board members.

This meeting requires a strategic approach, balancing the need to acknowledge the Board member's contributions and influence while emphasizing the importance of financial support for the University's mission.

Objective

To secure a \$50,000 financial commitment from the Board member by effectively communicating the critical role of Board philanthropy in advancing the University's mission while addressing their recent giving patterns and reaffirming their alignment with the Board's expectations for leadership and support.

Questions to consider

How will you acknowledge the Board member's vocal contributions and influence, highlighting their importance to the University and Board?

What approach will you take to transition from recognizing their past service to addressing their financial commitment in a constructive and respectful way?

How will you connect your request to the Board Member's legacy?

How will you make them feel that their continued leadership and philanthropy are essential to the Board's collective success and the University's future?

If they are unable to commit to \$50,000, what will do?

How will you close with gratitude?

The halls of congress

The background

The head of your state private college association calls and asks you to make a visit to Washington, DC to meet with one of your state's senators, who serves on the higher education committee. He says that your voice is especially important in support for the renewal of support for the Pell Grant program, given the number of your students who receive Pell Grants each year. You have never met your Senator in person or lobbied in Congress and you wonder what you will need to say to convince your Senator to support your students.

When you arrive at the Senator's office, the staff tells you that the Senator is on the Senate floor and will step out to meet you in the Senate cloak room. The staff member takes you on the underground train to the Senate building, where you wait for the Senator to come out to meet you. You will have just a couple of minutes to make your case...

The objective

More than 50% of your students receive Pell Grants each year and the grants contribute more than \$6 million to your institutional budget. You need to offer a compelling reason why continued support for your students and college is critical.

Questions to consider

What information do you need to make your ask? Where will you get that information?

What do you think are the three most important things you need to convey to the Senator in the short time you have available?

What sort of follow-up will you need to do after your visit?