**The Campaign for [CAMPAIGN TITLE]**

**Briefing Notes for Preliminary Solicitation Meeting With [DONOR NAME]**

**To:** Tonya Riggs, Board Chair

**From:** Essie Yang, Donor Manager

**Date:** 04/12/2019

**Meeting Information:**

Donna Smith
CEO of Smith Enterprises

Date of Meeting: 5/1/2019, Noon

Meeting Location: Aria Restaurant (223 West 45th St), private room, reservation under Tonya Riggs

**Attachments**: Individual Research Profile

*The following information has been compiled for your assistance in preparation for your meeting with Ms. Smith.*

**Goal**:

To secure a $50,000 leadership gift commitment from Ms. Smith in support of the campaign.

**Purpose of Meeting**:

1. To thank Ms. Smith for her 20 years of support to the station.
2. To discuss potential areas of interest in designating her eventual gift.
3. To discuss her potential level of support to the station, and request her consideration of a $50,000 leadership gift commitment.

**Background Information**

**Overview**

* Ms. Smith has indicated her intent to make a larger gift to the station; however, we do not know the exact level of support she is considering. We believe it is most likely in the $15,000 - $25,000 level.
* She has asked us to provide her with a few options/areas for consideration, that are priorities for the station, to which she can designate her gift. She commented that she is not attached to any particular area yet.
* She has indicated that she is eager to confirm and announce her gift, she may want to do that as early as the donor event at the Vice Chair’s home on July 8th.
* We believe that recognition associated with the gift is very important to Ms. Smith and a highly visible opportunity would help raise her sights to a larger gift opportunity of $50,000.

**Strategy**

* We believe that Ms. Smith has the capacity to make a $50,000 gift to the station this year, the value of her known public holdings is in excess of $15 million. As appropriate, it may be important to remind Ms. Smith that it will be difficult to approach other prospects for this level of giving if she, as our strongest supporter has not made a gift at this amount.
* Ms. Riggs, you can raise Ms. Smith’s sights by discussing your own personal commitment to the station and your motivation for making such an outstanding “stretch” gift. You are asking her to provide a level of leadership to the station that is relative to your commitment as the board chair.
* Ms. Smith is strongly identified with the station. A significant leadership gift in the range we are requesting would provide immeasurable benefit to the station. It would send an unequivocal message of support and commitment to the station and the community and would raise the sights of other donors who have the ability to make similar significant gifts (name some if appropriate).
* It will be important to remind Ms. Smith that we are asking our closest friends and supporters to make a deep personal commitment now to ensure that the station can dream big and create programs that connect our community and prepare us for new opportunities as they arise.

**Suggested/Potential Areas of Support**

As an initial point of discussion, we have selected a few key priority areas within the station that we believe will be of interest to Ms. Smith based on the current station priorities, and comments she has made about potential areas of interest.

1. **Creation of an education podcast**: Reporter Jill Maze wants to expand the education reporting into a podcast that explores both the local educational landscape and how that intersects with the state and federal resources available.
2. **Reporting series and event on our city’s cultural heritage**: The station had a very positive response to the piece earlier this year on the town’s 100th anniversary. This reporting series would expand to cover other cultural milestones as well as create in-person events to engage listeners and the business community in new ways.
3. **Civic engagement toolkit**: With the election coverage set to increase there is a potent opportunity to create a set of resources on the station’s website as single source for listeners to find ways to become engaged citizens.
4. **Supporting the work of the diverse voices initiative**: This program is well-loved by station staff and listeners but it is a difficult fit for corporate support clients. A gift from a donor would help keep this initiative sustainable and ensure that the station sounds like and represents the community voice.

**Donor Recognition**

We will work with Ms. Smith to ensure the designation and recognition of her gift is appropriate and meets her expectations. All of the projects presented for her consideration provide significant opportunities for recognition.

**Closing and Next Steps**

Please call Ms. Yang (222-555-4848) as soon as possible following your meeting to discuss the outcome. Depending on the outcome of your discussion, next steps may include further cultivation meetings with Ms. Smith and key station leadership and or a formal proposal submission outlining one or more of the projects discussed during your meeting. We will be prepared to present a detailed proposal on any of the projects discussed and or any other area of interest within the station.