# Sample Phone Script

*Growing the Canopy* Campaign (V 9.20.15)

Hello, May I please speak to James? This is \_\_\_\_\_\_\_\_\_\_, a volunteer calling from Canopy.

**THANK THE DONOR.**

Hello James. My name is \_\_\_\_\_\_\_\_\_\_\_\_\_. I’m a volunteer (*a board member)* for Canopy. We met at the Annual Party this past year *(or whatever personal comment you are able to make).* I want to thank you for being such a generous supporter of Canopy’s work year after year.

If you have a minute, I would love to hear why you support Canopy. Is there a particular part of our mission that has influenced your giving over the years?

**LISTEN; ASK FURTHER QUESTIONS**

**Transition:** …That’s wonderful! We always appreciate hearing your thoughts and feedback. We are definitely passionate about… *(Connect back to their comments).* If you have another minute, I would love to share with you some of the new ways that Canopy is working to grow healthy trees and healthy communities in our area.

**INTRODUCE THE CASE**

About a year ago, Canopy completed an initiative to plant 1,000 trees, mostly at schools in East Palo Alto that were sorely lacking trees and greenery. It was a lot of fun -- kids and parents came out to help with the tree plantings, and we worked with the teachers to give kids hands-on lessons about trees and tree stewardship.

Because of that successful work in East Palo Alto, the school districts in both Redwood City and Mountain View have now asked us to bring our tree planting and education programs to low-income schools in their districts. East Palo Alto has also asked us to expand our work there.

The most exciting news is that all three of these school districts are in the midst of facilities master plans, and they have invited Canopy to participate. This gives us a truly pivotal opportunity to plant and grow the urban forest in areas of the Mid-Peninsula that are most in need of more trees.

Expanding our programs into these new communities is projected to cost about $1.2 million. Canopy’s regular funding sources cover about half of that. To make up the difference, Canopy has mounted a campaign called *Growing the Canopy.* The goal is to raise the remaining $600,000 so that we can (1) Plant 1,000 new trees; (2) Care for 2,000 new and existing trees; and (3) expand our education programs to engage more youth as leaders and stewards of nature in their community.

**MAKE THE ASK (FOR A MEETING)**

If this sounds like a project you might be interested learning more about, would be willing to meet with me for coffee or lunch sometime to hear more about it?

* ***If yes...*** Wonderful, what would be a good date and time for you? (*Or, agree to follow up via email.)*
* ***If not a good time now****...* If now is not a good time, I would be happy to call you back when you are less busy *(or back from vacation, you wife is out of the hospital, your product is not shipping, etc.)*
* ***If hesitant...*** Would you like me to send you some materials that explain this campaign in more depth? Great. I’ll put the materials in the mail tomorrow and give you a call next week.

**FOLLOW UP. PROMPTLY.**

***If a hard no...(***e.g. I’ve lost my job. I feel that our annual donation is really all we have to give right now.)

I’m sorry to hear that *(this thing happened…or you’re not in a position to help us out now),* but I do want to express my appreciation for the ways that you have supported Canopy in the past *(If you know of specific ways they’ve been involved like volunteering or attending events, then mention these).* It means a lot to us! If you ever have other thoughts or questions about Canopy’s work, I hope you’ll get in touch with me or anyone from the Canopy Board or Staff.

**THANK YOU** for spending time on the phone with me. Have a wonderful day!