

## Talking Points: Smith

**Prospects:** Kathy & Bob Smith  
(Ann in Jeff's Class, son Bill is at MSD)  
Bob serves on Endowment Investment, Kathy serves on Finance

**How much:** \$15,000 (over 3 years)

**Who participates:** Geoff, Markus, Heather

**Where:** Markus' office

**When:** 8:35 am 5/12/17

**Roles:** Heather "The introduction"  
Geoff "The ask"  
Geoff "The Endowment pitch"  
Markus Head of School and "Why Logan is SO Important"  
Heather Development Director and "Any questions"

**Theme:** **Leadership Gift – Jumpstart campaign – Sustainability & Financial Aid**

### **Order:**

1. Introduction - **Heather**
  - Thank them for her time
  - "We are here to discuss the endowment with you because of your passion for the school. In fact, at this point we are only speaking to a handful of families that we see as leaders in the community. We'd like to talk to you about participating with a leadership gift. But first it's important to remember what a unique opportunity it is for our kids to go this school. And I would like to ask Markus to speak more about that" (or something along those lines)
2. "Why this school is unique and needed" **Markus (5 minutes)** –Emphasize experience-based for gifted. Gifted kids are at the end of a bell curve and can be overlooked, leading to frustration and poor achievement at best.
  - Because our school is process-oriented, we encourage inventive thinking, imaginative and intuitive insight, and exploration and discovery of the world.
  - We allow kids to explore their passions to the limit, to "go broad" instead of having to be pushed or accelerated as the only way to meet their academic abilities. At the same time, we believe in no ceilings.

- Experience-based learning means individual field trips which gives kids an unparalleled opportunity to investigate, explore, and learn outside of the school grounds.
  - Importantly, the Logan school is a respectful, nurturing environment where students respect themselves, respect others, and respect their community.
  - There is no other school in the nation like this.
3. “The Endowment” Why we need the money and where it will go: **Geoff (8 minutes)**
- “Everything that Markus has mentioned- everything that makes Logan a unique and special school – is supported by the Endowment.
  - Endowment is critical to making a Logan education available to as many kids and families as possible.
    - ✓ Since tuition only pays for 80% of an education, Endowment helps make up the gap, reduces dependence on year to year fundraising, and ease the pressure to increase tuition. This is very important to keeping Logan open to as many families as possible. (The last several years the Logan endowment has contributed approx. \$50,000 to the operating budget. **Another local private school last year distributed more than \$1,352,000**)
    - ✓ Financial aid: 1 in 5 kids at Logan receives some form of financial aid.
  - Endowment is critical to supporting teachers. There is no question that highly skilled teachers are key to a Logan education. The Board has been working on raising salaries and wants to continue to attract and retain the best teachers.
  - Financial stability – the Endowment is critical to ensuring this unique educational experience is here today and in decades to come. We stand on the shoulders of visionary families before us
    - ✓ \$3 million to move to this campus
    - ✓ \$5.5 million to renovate in the capital campaign
    - ✓ \$2 million Endowment
  - A gift to the Logan Endowment is a gift in perpetuity.
    - ✓ Your money is never spent, it gives back to the school forever.
    - ✓ It is a lasting legacy that lives on for generations.
  - Today we come to you to ask you to take on a leadership role in this campaign. The generosity of prior donors is astonishing – but we need to show significant new leadership not only to reengage those donors but to build momentum and excitement so we can reach other major prospects

- Transformative to the future of the school
- 4. "The Ask" Geoff **(1minute)**
  - "Please join us - Genery and myself, and the Board of Trustees - in making a significant commitment to the Endowment campaign. Today I ask you to give a leadership gift of \$15,000 over 3 years.
  - \$15,000 over 3 years, in the general or financial aid bucket
  - **\*\*Nobody talks until the Kathy talk or Heather talks\*\***
- 5. "Questions, Nuts & Bolts" **Heather, et al. (Heather may have to get financial answers from Finance or EIC chairs after the meeting and forward them to them.)**
- 6. "Closing" **Heather**
  - Thank them for their time
  - Set up follow up meeting or call – if necessary

Notes: