



## Rating the writing: how to assess a telephone fundraising script

Writing a telephone fundraising script is a lot like writing a fundraising letter. (It’s a lot different, too!) What the two forms have most strikingly in common is that they’re based on years and years of accumulated knowledge about what works and what doesn’t—when real people receive your letter or your phone call. And much of what we’ve learned in the course of all those years is likely to be surprising to anyone new to fundraising. (The fancy word is *counter-intuitive*.)

Recently the good folks at *CASE Currents*—the monthly magazine for development officers at colleges, universities, and private schools—asked me for an article about how to write an effective telephone fundraising script (sometimes called a “conversation outline”). In taking up their challenge, I developed the following assessment tool. It appeared along with the article in the May 1996 edition of the magazine.

I’m indebted to my colleagues at the Share Group, and especially Joe White, for the benefit of their many years of experience. Their comments are reflected below.

*Rate script on each criterion, circling the rating, with 5 = best, 0 = worst.*

#	Criterion	Rating	Weight	Total
1	Opening is respectful and involving. Builds rapport and leads to conversation.	0 1 2 3 4 5	x 1 =	
2	Message is simple and straightforward, easy to understand. Includes a minimum of detail.	0 1 2 3 4 5	x 1 =	
3	Simulates a real conversation. Uses the singular personal pronouns, “you” and “I.”	0 1 2 3 4 5	x 1 =	
4	Written in natural language. Easy to read aloud. Uses contractions, short sentences, no ten-dollar words or acronyms.	0 1 2 3 4 5	x 1 =	
5	High-energy. Communicates enthusiasm.	0 1 2 3 4 5	x 1 =	
6	Talks about donor benefits, not institutional needs. Encourages participation. Seeks the donor’s agreement on the case.	0 1 2 3 4 5	x 5 =	
7	The “Ask” is unmistakably clear. Asks for a specific amount of money or other explicit act.	0 1 2 3 4 5	x 4 =	

SUBTOTAL THIS PAGE

#	Criterion	Rating	Weight	Total
8	Ask is repeated in a natural progression, from high to low, emphasizing additional benefits with each subsequent offer. Facilitates negotiation of the gift.	0 1 2 3 4 5	x 3 =	
9	Establishes urgency—i.e., makes the case to take action <i>now</i> . Refers to a concrete campaign goal.	0 1 2 3 4 5	x 2 =	
10	Formatted and designed for easy reading. NOT written in capital letters. Uses white space, indents, bullets, underlining, or other visual cues to make script easy to follow. Color-coding for multiple scripts.	0 1 2 3 4 5	x 3 =	
11	Makes best use of segmentation opportunities, with variable message for different interests.	0 1 2 3 4 5	x 5 =	
12	Pledge amount is confirmed. Seeks commitment from donor to send money within a specific period. Mailing address (and possibly other information) is verified.	0 1 2 3 4 5	x 2 =	
13	Payment procedures are clearly explained. Donor will understand exactly what will happen and when.	0 1 2 3 4 5	x 1 =	
<b>SUBTOTAL THIS PAGE</b>				
<b>TOTAL</b>				

***First, total your 13 ratings. (Remember: 0 x 1 = 0!)***

***Then, to evaluate your score . . .***

With as many as five points available for each of the thirteen criteria, and weighting factors that total 30, a perfect score is 150 points. You may translate a numerical score into a letter grade as follows:

<b><i>Rating</i></b>	<b><i>Letter Grade</i></b>	<b><i>Meaning</i></b>
140 - 150	A+	No more need be said.
120 - 139	A	Give that writer a pat on the back!
100 - 119	B	Shows lots of promise.
70 - 99	C	Needs some improvement.
40 - 69	D	Requires a lot of work. Maybe better to start from scratch!
0 - 39	F	Uh oh!