Creating a 12-Week Major Gifts Campaign
Training Materials

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Creating a 12-Week
Major Gifts Campaign

Philadelphia Free Library

6/21/11, 9:30 – 12:30

Introductions - review agenda - icebreaker

What's a "major gift?" Why 12 weeks? Why face-to-face asks?

Step 1: Clarify the case for the campaign (exercise)

Step 2: Set a goal and build a gift chart

Step 3: Create a campaign calendar (exercise)

Step 4: Create campaign materials

BREAK

Step 5: Recruit and train askers

Step 6: Identify and assign prospects (exercise)

Step 7: Engage prospects

- Letter (email)
- Phone (email)
- Visit (3 way role play)

Step 8: Hold each other accountable

Step 9: Celebrate and evaluate

Next steps and assignments

ADJOURN

BASIC PRINCIPLES OF FUNDRAISING

1. Identifying your prospects. In general, prospective donors must meet at least two of the following three qualifications:

Ability –	Do they have any available money to give?
Belief –	Do they care about your issue, programs, etc.?
Contact --	Do they have a relationship with any of your board members, staff, or major donors?

2. The closer you get, the more you raise. As the old saying goes, people give money to people, not organizations. Therefore, you want as much human contact with the donor as is reasonably possible. In terms of solicitation strategies, the following list descends from most effective to least effective:

A. Personal face-to-face; team of two preferred over one
B. Personal letter on personal stationery; telephone follow-up will improve results
C. Personal phone call; follow letter will improve results
D. Personalized letter
E. Impersonal letter (direct mail)
F. Impersonal telephone (telemarketing)
G. Fundraising benefit/special event
H. Door-to-door canvassing
I. Media/advertising

3. The gift range chart. In a typical annual campaign – the money that organizations raise each year for general support –

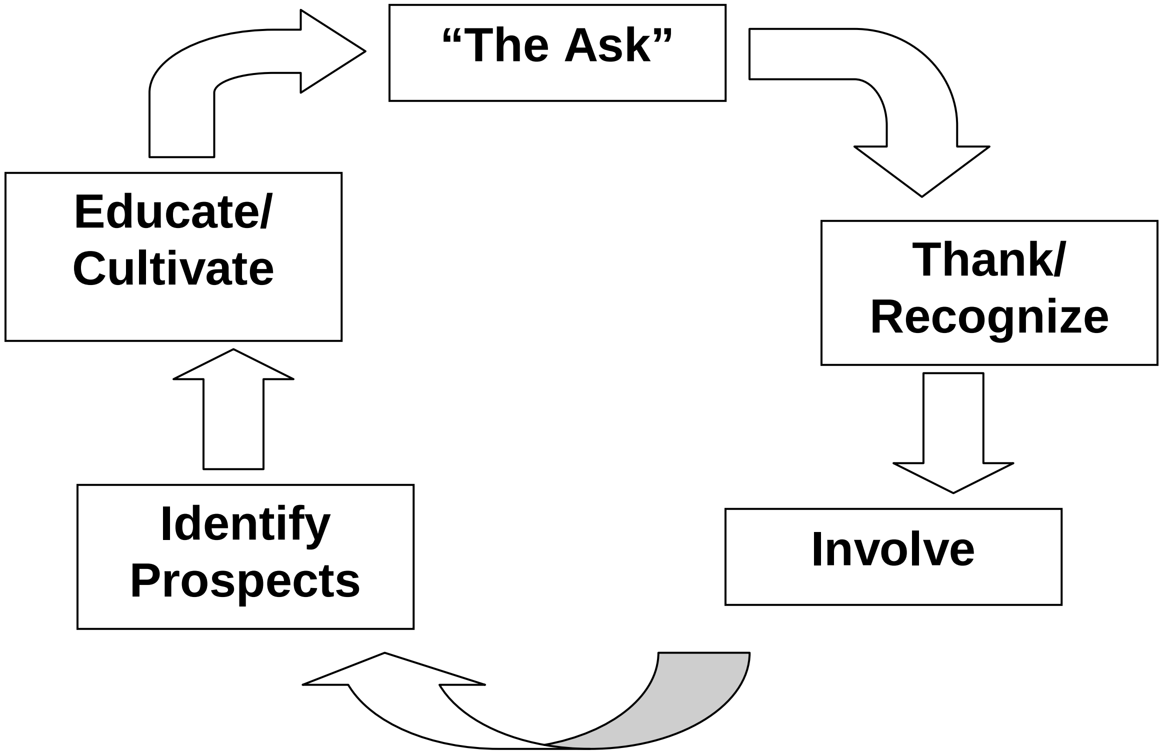
10% of the donors yield 60% of the money;
20% of the donors yield 20% of the money;
70% of the donors yield 20% of the money.

In other words, most organizations rely on a handful of major donors to generate the majority of their unrestricted income. Using this principle, you can set your goal and then calculate how many donations at each level you'll need to meet that goal. For example, for a $50,000 annual campaign:

$ Gift Range	# Gifts	# Prospects	Total $ per Range
$2,500	2	10 (5:1)	$5,000
$1,000	5	25 (5:1)	$5,000
$ 750	10	40 (4:1)	$7,500
$ 500	15	60 (4:1)	$7,500
$ 250	20	60 (3:1)	$5,000
10% of donors			60% of goal
$ 100	100	300 (3:1)	$10,000
20% of donors			20% of goal
under $100	350	700 (2:1)	$10,000
70% of donors			20% of goal

This is an idealized chart; reality is never so orderly. Use this tool to plan, guide, and evaluate your fundraising campaign.

Cycle of Fundraising



Involvement at any point in this cycle is part of fundraising,
and involvement at every point is needed!

“We don’t have to do this all year long?”
Structuring the major gifts campaign

The most effective fundraising campaigns are time-limited events, although the length of time depends on the goal. Capital campaigns, which focus on land or buildings, can run for two or three years. Major universities now have ten-year campaigns, which beg the concept of “time-limited.”

Smaller organizations usually lack the infrastructure to sustain multi-year campaigns or even year-round major gifts fundraising. It’s certainly possible to set up solicitations throughout the year, but many organizations choose to conduct their major gifts campaign in one concentrated burst over a 10 to 12 week period. This approach offers several advantages.

- A sense of urgency based on deadlines negotiated among the participants.
- Organizational focus. During campaign season, major gifts fundraising becomes the primary mission of board and fundraising staff.
- The opportunity to recruit and simultaneously train a team of solicitors who can compare notes and learn from each other throughout the process.
- Time off when the asking is over.

Many board members complain about the perpetual pressure to raise money. As an alternative, I suggest you focus board efforts on a time-limited major gifts campaign *because it generates the most money raised per hour of volunteer time*. In the ideal world, this should be the board’s primary fundraising activity, period.

If trustees choose to participate in other activities during the rest of the year – organizing house parties, helping with grant proposals, asking friends and family to make donations in lieu of holiday gifts – that’s terrific. And if individual board members choose to skip fundraising for the remainder of the year, I can live with that, *as long as they participate fully in the campaign.* During campaign season, everyone’s primary commitment is to help with major gifts.

When scheduling your campaign, consider the following questions.

- *When are your prospects available?*
- *When are your solicitors available?*
- *When are other organizational resources available?*

The traditional campaign is led by a volunteer chair or co-chairs who supervise and support three or four team leaders, who in turn supervise and support three or four solicitors each. Make sure that everyone checks in periodically throughout the campaign to compare notes, stay on task, and share success stories.

When it ends, tally up your results throw yourselves a party to celebrate the effort. Then take some time off – you deserve it!

FIVE VALLEYS LAND TRUST

STEWARDSHIP CHALLENGE 2009
Goal: $250,000

Committed to date (8/25/09): $130,351
■ = committed gift

Gifts Needed	Gifts or Pledges in Hand	Gift Amount	Category Total	**CUMMULATIVE TOTAL**
5	■■□□□	$10,001 - $25,000	$75,000	$75,000
8	■□□□□ □□□	$5,001 - $10,000	$50,000	$125,000
20	■■■■■ ■■□□□ □□□□□ □□□□□	$2,501 - $5,000	$60,000	$185,000
20	■■■■■ ■□□□□ □□□□□ □□□□□	$1,001 - $2,500	$30,000	$215,000
30	■■■■■■ ■■■■■■ ■■■■■■ ■■□□□□ □□□□□□	$500 - $1,000	$20,000	$235,000
	346 gifts	$499 or less	$15,000	$250,000

Major Gifts Campaign Calendar (Group 1)

Pre Campaign	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12
	Set a $ goal	Create board "campaign agreement"	Identify prospects	Train askers	Send letters	Phone prospects to schedule appointments	Meet with prospects	Send letters	Deposit checks	Follow-through calls to undecided prospects	Thank donors	Wrap-up meeting to evaluate campaign
	Identify campaign leadership	Create lines of accountability	Rate the prospects by giving potential	Send letters	Phone prospects to schedule appointments	Meet with prospects	Test and modify goal: enough prospects?	Phone prospects to schedule appointments	Follow-up calls to undecided prospects		Wrap-up celebration	Identify leadership for next campaign
	Create campaign calendar	Identify prospectors (to suggest names)	Identify askers (solicitors)			Thank donors	Thank donors	Meet with prospects	Meet with prospects			Publicize success
	Prepare a gift chart (gifts needed to reach goal)	Prepare campaign materials (pledge forms, FAQs, etc.)	Assign Prospects			Check-in meeting with leadership and askers			Check-in meeting with leadership and askers			
		Prepare letters to prospectors	Test and modify goal: Enough askers?			Identify and circulate success stories						

Major Gifts Campaign Calendar (Group 2)

Pre Campaign	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12
Identify prospectors (to suggest names)	Create campaign calendar	Train askers	Identify prospects	Send letters	Phone prospects to schedule appointments	Meet with prospects	Check-in meeting with leadership and askers	Meet with prospects	Thank donors	Wrap-up celebration	Identify leadership for next campaign	Take vacation
	Set a $ goal	Create board "campaign agreement"	Prepare campaign materials (pledge forms, FAQs, etc.)		Send letters	Phone prospects to schedule appointments	Meet with prospects	Thank donors		Wrap-up meeting to evaluate campaign		
	Prepare gift chart (gifts needed to reach goal)	Create lines of accountability	Assign prospects			Send letters	Phone prospects to schedule appointments	Check-in with leadership and askers				
	Identify campaign leadership	Identify askers (solicitors)	Prepare letters to prospects			Follow-up calls to undecided prospects	Follow-up calls to undecided prospects					
		Test and modify goal: enough askers?	Test and modify goal: Enough prospects?				Thank donors					
		"Rate the prospects" by giving potential	Brief program staff									

Nonprofit marketing worksheet

What are you selling? In other words, what do you do well?

Write down three things about your organization -- accomplishments, structure, the people involved, etc. -- that you're most proud of:

1.

2.

3.

Differentiation: what makes your group unique?

What do you *have* or *do* that no one else has or does?

1.

2.

3.

Market segmentation: who are you trying to reach?

List your different markets:

1.	6.
2.	7.
3.	8.
4.	9.
5.	10.

What's your "sound bite"?

Given limited time, what words will you use to capture their attention? Write down phrases or sentences that describe what you do *and* provide an emotional appeal for the reader or listener. Tell a compelling story.

Beth Jacob Synagogue building campaign – PHASE 2

Name(s) ____

Address ____

____

Home phone ___________________ Cell phone __________________________

Work phone ___________________ Email ______________________________

Total pledge $ ___________ over ___ 1 year ____ 2 years ____ 3 years

If you are making a multi-year pledge, please fill out payment info below:

2008 amount $___________ 2010 amount $ __________

2009 amount $ ___________ 2011 amount $ __________

Recognition and honors
All donors will be recognized on a plaque in the synagogue, unless you wish to remain anonymous. May we include your name? ____ Yes ____ No

Would you like your gift to honor or memorialize someone? _____ Yes _____ No
If the answer is yes, *please fill out the attached form listing naming opportunities.*

Payments will be made
___ once per year on ___________ (date)
___ twice per year on __________ and __________ (dates)
___ four times per year on _________, __________, __________ and __________

I will be making my gift by
___ check
___ credit card ___Visa ___MC # _______________________ Expiration __/__

Please return to Beth Jacob Synagogue, PO Box 1133, Montpelier, VT 05601.

Thank you for your support!

______________________________ ____________________________________

Donor (signature) date For Beth Jacob Synagogue (signature) date

Columbia Land Trust Donor Relationship Management MENU

We value:

- Listening deeply
- Consistent, professional follow-through
- Authenticity
- Good systems for tracking information
- Full participation and commitment
- Effective messaging and materials
- Training our relationship managers
- Benchmarks and incentives for success

Identify Prospects

- "Keep your antenna up" when talking with landowners, volunteers, friends, etc.
- Open personal contact lists, Rolodexes, etc.
- Review donors lists from like-minded nonprofits
- Focused donor research

Educate and Cultivate

- Communicate with stories, photos, video: nature, land, people
- Newsletters and other print materials
- Tours and walks
- Asking questions (develop a list) and collecting answers
- Donors talk to donors
- Social media
- Face to face meetings

The Ask

- Face to face visits (as lead asker or support person and storyteller)
- Letters
- Emails
- Phone calls and phone banks
- House parties and other events
- Social media asks
- Challenge gifts

Thank and Recognize

- Personal notes
- Phone calls
- Events
- Publishing names in print and online
- Emails
- Gifts, photos, logo items
- Informal thank yous when you see a donor

Involve Donors

- Ask donors to volunteer: Stewardship work parties, writing, photography, office work, legal support, marketing, tours and interpretive work, etc.
- Participate in governance: committee or the CLT board
- Make introductions; open doors
- Advocate for CLT in decision-making bodies like the legislature
- Bequests and other planned gifts

Who's a prospect?

Ability: **Do they have any <u>money</u> to give?**

Belief: **Do they <u>care</u> about your issues, programs, constituency, etc?**

Contact: **Do they have a <u>relationship</u> with any of your board members, staff, donors, or key volunteers? Are they already contributing money, time, or both?**

If people meet these three criteria, they are PROSPECTS and should be asked to contribute (or perhaps to contribute more).

Creating a Prospect List

	Name/ Address	Relationship to me	Believes in cause	Gives money	Gift range
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					

Sample letter:
Setting up the face-to-face ask

Martina Jones
123 Main Street
Des Moines, IA 55555

Dear Martina:

It's that time of year again – we're doing our annual fundraising campaign in support of (brief description of your mission). Last year, you made a very generous donation of $500, which is a big gift for us, and we really appreciate your support. Contributions from people like you helped us to accomplish the following:

- (Big, impressive accomplishment)
- (Not so big, but still impressive)
- (Something interesting the donor is unlikely to know about)

This year, we face a number of challenges:

- (Big, scary challenge – maybe increased demand for your services?)
- (Not so big, but still impressive)
- (Perhaps something related to organizational development, rather than external factors)

To meet these challenges, we are asking our most generous supporters to consider doubling their gifts, which in your case would be a contribution of $1000. I appreciate that this is a big commitment, so before you decide, I would love the chance to meet with you, give you an update, learn more your interest in our work, and ask for your support.

I will be calling you next week to set up an appointment.

Again, thank you for your generous and loyal support. I look forward to speaking with you, and meeting with you, very soon.

Warm regards,

If you're uncomfortable naming a number, consider language like this:

We're asking for gifts of between $500 and $5000 toward a campaign goal of $50,000. To be honest, I have no idea how much to ask you for, so let's sit down together, discuss it, and you can tell me how much would be appropriate.

If you're soliciting a new prospect, the relevant paragraphs might be:

> As you might know, I'm on the board of Everybody Loves Everybody, which works to (brief description of your mission). Our organization has a long history of success, including (insert bulleted items here).
>
> One of my tasks as a board member is to identify new supporters for our work. We've set goal of $____ and we're seeking donations of between $____ and $____ to help meet that goal. I'd like to arrange an appointment so we can discuss the work and see if you'd like to contribute.

Use these letters as templates by adapting the language and tone as you see fit. In writing the letter, keep the following points in mind:

- **It's brief –** no more than one page.
- **It says "thank you."** It acknowledges past support or, in the case of new prospects, it thanks them for considering a gift.
- **It's explicitly about fundraising.** It doesn't hint or use code words – your intentions are clear from the start.
- **It includes numbers.** It mentions the amount you seek or suggests a range of gifts.
- **The purpose of this letter is not to get money, but rather to get a meeting.**

It's not necessary to craft a piece of great literature – after all, this is a one-page "I want to meet with you" letter – so don't strive for perfection. It might make sense for one person, perhaps a staff member, to prepare a standard letter that board members and other solicitors then customize. Get it done and mail it out.

Do I Hear Any Objections?
Responses to common put-offs

Sooner or later you will have this experience. After a few words of explanation – "Hi Leroy, this is Andy. I'm following up on the letter I sent about our fall fundraising campaign" – the person on the other end of the phone will say, "Sure, I'd love to get together. When's a good time for you?" Until that day, however, you must learn to respond to the most common objections.

I don't mean to imply that this is one conversation and you have to handle eight or nine put-offs in a row. However, the general rule is that you should respond to at least three before you give up.

> *Objection: "I don't have time to talk right now."*
> Response: "When would be a good time to call?"
>
> *Objection: "You sent me a letter? What letter?"* (Or alternatively, *"There's a pile of mail on the kitchen table – bills and such – and I've been avoiding it."*)
> Response: "Well, let me tell you about the letter."
>
> *Objection: "I don't really have the time to meet. Can't we just do this over the phone?"*
> Response: "That's up to you. The meeting takes about twenty minutes, and I'll make it as convenient as possible – I can come to your home or office, whatever works for you. This just works better if we meet face to face. But if you'd prefer, we can talk about it now."
>
> *Objection: "I can't afford the amount you're asking for."*
> Response: "The amount is completely up to you. Let's sit down together, discuss it, and then you'll decide."
>
> *Objection: "You know, I generally make charitable decisions with my spouse/partner/financial advisor/eight year old child/psychic friend."*
> Response: "Is it appropriate for the three of us to sit down together? If so, when would be a good time? If not, how can I help you to have that discussion – maybe the two of us could meet first?"
>
> *Objection: "You know, I support so many other groups and I'm tapped out for this year."*
> Response: "I know the feeling. Tell you what – let's take the money off the table. I'd still like to meet with you because a) I'd like to thank you for your generous support last year, and b) when you're budgeting for next year, perhaps you could remember us then. So let's assume you won't be giving now – I hear that. But I'd still like to meet. When would be a good time?"
>
> *Objection: "I gave because of your work on ____, but I don't like the position you've taken on ____."*
> Response: "You know, I'd like to hear more about your concerns. Frankly, I don't like everything the organization does, but overall I believe that the mission and the work are very important. Let's get together and talk about it; then you'll decide. If you choose not

to give, I certainly respect that. When would be a good time to meet?"

Objection: "We're down to one income and we don't have the money."
Response: "I'm sorry to hear that. Is there some other way you'd like to be involved in our work?"

Objection: "This is just not a priority right now."
Response: "Well, your past support has meant a lot to us. Shall we keep you on the mailing list? Is it appropriate to contact you again in the future?"

You're probably thinking, "What's wrong with this guy? Can't he take 'no' for an answer?" My response: "When people say no – *"We don't have the money"* or *"This is not a priority right now"* – I hear them say no. But when they say, *"That's more than I can afford,"* or *"I have to talk with my spouse first,"* that doesn't mean that they don't want to give – it means that they want to choose the amount or would prefer to consult with someone else before making a decision.

The *Three Rules of Telephone Appointment-Making:*

1. Whatever the objection, take it literally. Rather than making assumptions about what other people mean, take them at their word. The corollary is this: if they say no – a clear, explicit no – you have to honor that.

2. Assume success. Don't say, "Do you want to meet?" Ask, "*When* do you want to meet?" This is a subtle distinction, but it makes a big difference.

3. Keep bringing it back to your agenda. "When do you want to meet?"

You have to find your own comfort level. If these suggestions seem a bit too assertive for your taste, back off a little. Strive for a balance between assertiveness and humility, between boldness and fear. If you give in to the fear – if you backpedal at the first objection – you do a disservice to yourself, your group, and your donors. Be bold and watch what happens.

Major gifts visit: Structuring the conversation

1. Build rapport. Chat a little. Start with topics that have no bearing on your organization or fundraising campaign. “How’s your job? What are your kids doing these days? I notice you’ve got your garden in; what are you growing this year?” Don’t spend a lot of time on idle chatter – the meeting might get away from you – but it’s good manners to ease into the topic at hand.

2. State your goals for the meeting. This step is optional but recommended. You might say, “Margarita, I’ve come today with three things on my mind. One, I’m here to tell you about our work. Two, I want to learn more about you and your interests. Three, it’s my responsibility to ask for your financial support. To tell you the truth, I’d like to know why you’re interested in our organization, so let’s start there.” This provides a clean segue into the next item.

3. Uncover the person’s needs and interests. Find out why he or she cares about your work. For a donor, the questions might be, “You gave us $500 last year, which is a big gift for us. Why did you do it? Why do you care about this issue?” When talking with a prospect who is considering a first gift, perhaps you can ask, “What’s your experience with our work? Why does it interest you?” Initiate a dialogue by asking questions. Get the prospect talking.

4. Present your organization: your goals, programs, and financial needs. Tell stories. Where relevant, cite statistics. Keep it brief; don’t overwhelm the person with a blow-by-blow description of your 14-point strategic plan. If you have visuals that tell your story – maps, graphs, photos, charts, or site plans – this is an opportunity to use them. Encourage questions.

5. Ask for the gift. Be clear, explicit, and straightforward. “Sally, as I mentioned in the letter, we were hoping you'd consider a gift of $1,000 to support our work. It would mean a lot to us. What do you say?” As an alternative, “As I mentioned in the letter, we’re looking for gifts of between $500 and $5,000. I appreciate that this is a wide range, and to be honest, we don’t know the appropriate amount to ask of you. How much would you like to give?”

Once you’ve asked for the gift, wait – *keep your mouth closed*. Don’t make excuses or start to backpedal before the donor has a chance to respond. Just sit quietly and wait.

6. Deal with any objections. Some of the objections you answered by phone are likely to come up again now. Think in advance about these objections and how you might respond. Practice your answers and bring notes to the meeting. For example, if the person says, “You’re asking for more than I can afford,” you can reply, “How much would you like to give?” In response to, “I’m unable to give right now,” you could say, “Do you want to make a pledge now and pay later? If that works for you, it works for us.” Most of these responses are nothing more than common sense, so:

- Take a breath,
- Ask yourself, “What’s the logical response to this concern?”
- Respond accordingly.

7. Close the meeting. Restate any agreements you've made so both parties leave the room with the same expectations. Once again, be clear, explicit and straightforward.

"The Ask"
Meeting with your prospect

The purpose of this role play is to help you:

1. Develop confidence and clarity in your "pitch" -- how you present your work
2. Develop empathy for the person on the other side of the relationship -- the prospective donor
3. Improve your listening skills

Dramatis personae (Shakespearean for "the parts to be played"):

1. **The asker (or solicitor)**. A volunteer or staff member who helps with fundraising.
2. **The prospect**. A current or prospective donor who is known to the asker -- in other words, they have a direct personal relationship.
3. **The observer**: who gets to watch and comment (after the role play is over).

By the end of the exercise, everyone will have the opportunity to play all three roles.

Setting up the role play

The asker reviews the prospect list that he or she filled out earlier and chooses one person on the list. The asker then trains the prospect to "be" that person by describing the prospect's current level of knowledge and involvement with the organization.

For example, the asker might say, "I want you to be my Aunt Rita. She always talks to me about my work and seems very interested. She came to our open house event last year but has never given. I know she attends church, which makes me think she is charitable, and when I was at the theatre I saw her listed in the program as a $250 donor."

Where to meet: You decide. Your options include the prospect's home or office, your home or office, or a neutral location (such as a restaurant).

Asker

Your goal is to:
1. Introduce the work of your organization.
2. By asking questions, find out what the prospect cares about and how your work might address his or her interests.
3. Encourage the prospect to agree to a next step; this could include:
   a. Make a gift or a pledge.
   b. Suggest other prospects.
   c. Volunteer to help with program or fundraising needs.

Bonus points: show and tell (visual aids)

Prospect

Your goal is to:
1. Learn more about this group without spending a lot of time.
2. If you can, identify one aspect of the group, the project, or the presentation that grabs your attention.
3. Provide a few objections or obstacles for the solicitor to address.
4. Based on the conversation, decide if you will:
    a. Contribute or pledge today.
    b. Delay your decision ("I'd like to think about it.")
    c. Decline to donate.
    d. Become involved in some other way.

Bonus points: Unexpected distractions (phone calls, pagers, other people going in and out, etc.) are allowed.

Observer

Your goal is to:
1. Watch, listen, take notes, and be prepared to talk about what you see and hear.

Bonus points: Save your comments for the debriefing period.

Structure of the meeting (instructions for the asker)

1. Briefly build rapport with the prospect by discussing any mutual interests, friends, etc
2. Uncover the prospect's needs and interests. Why does he or she care about your issue or programs? If the prospect were to give, what would s/he want in return?
3. Make a brief presentation about your work, allowing the prospect to participate and ask questions.
4. Ask for the gift, naming a specific amount or a range. After "the ask," keep quiet and wait for the prospect to respond.
5. Deal with any concerns or objections.
6. Close the meeting by re-stating and clarifying any agreements or next steps.

To "debrief" this exercise

1. The asker goes first. S/he says *two things about the meeting that went well and one thing that could have worked better, with an idea for how to improve it.*
2. The prospect goes next, following the same format.
3. Finally, the observer offers comments, following the same format.

Timing: Each side of this triangle (role play plus debriefing) takes 15-20 minutes. Then all participants rotate to a new role. Total time: 45-60 minutes. The facilitator will keep track of the clock and announce when it's time to switch roles.

Sierra Club Iowa Chapter

Volume 2, Issue 1

September 3, 2010

2010 Fall Fundraising Campaign

Chapter Launches Second Annual Campaign

The Executive Committee launched its 2nd Annual Fall Fundraising Campaign on August 28. The campaign's goal for this year is to raise $37,500 by November 14.

Committee members present at the August meeting rehearsed their fundraising pleas with other ExCom members. Of the nine members present and a pledge from one that was absent, the group collectively raised $3,735.00.

Congratulations! That's awesome.

Annual Dinner Invitation

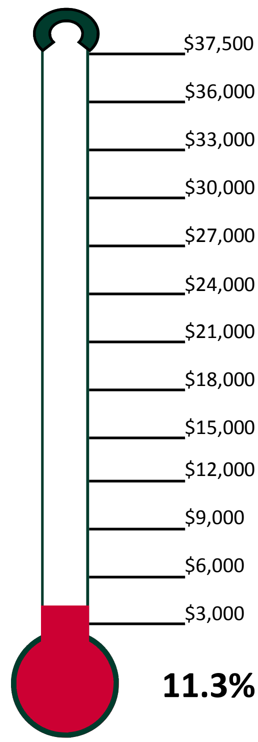
Donna recommended "inviting prospects to a small gathering of supporters and potential supporters so that they can learn firsthand the magic of your organization and the need for support now."

Our Annual Dinner is October 1. Reservations and payment are due to Jane by September 15. Although there is some wiggle room, we need to know how much food to order.

Your packets contain one promotional flyer for every prospect assigned to you. Try to make your contacts with donors so they can make a reservation by the September 15 deadline.

Questions

If you are asked questions about an issue and you don't know the answers, please write down the question, send it to me and I'll draft an answer for you. I will be on vacation beginning Friday, September 3, and will return on Monday, September 13. If a question arises before I return, either contact Pam or let your donor know it will be at least the week of September 13 before we can get back to them with an answer.



Campaign Goal	**$37,500**
Gifts & Pledges	**$4,785**
Yet to be Raised	**$32,715**

ExCom Member	Started	Completed
Buell		
Carsner		
Clark		
Murdock		
Engstrom		
Neff		
Neustadt		
Redmond		
Riggs		
Soelberg		
The Taylors		
Tigges		
Winterwood	X	
Whiting		

Remember the paperwork

In case you missed it at Saturday's meeting, it is CRITICAL that the donor and the solicitor sign and date the pledge form (yellow sheet) then send the form to me. I need the pledge form in order to record the pledge and/or check. The signed pledge forms are also important for us to acknowledge our donors early next year.

Tips:

If you make a pitch to someone and they say "contact me in a month," first let them know that they can pledge an amount and agree to pay later. If they still ask to be contacted later, put it on your calendar and REMEMBER to call them later. A simple phone call would be fine, offer to pick up their check and then fill out the pledge form when you pick up the check.

Sierra Club Iowa Chapter

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Email: iowa.chapter@sierraclub.org
Web: www.iowa.sierraclub.org

Explore, enjoy and protect the planet

Thank you cards are included in your packet. Please remember to send a personal thank you card after you meet with your prospective donor. I will send an official thank you letter from the Chapter after I receive the pledge form and/or the check.

**We're on the web!
Iowa.sierraclub.org**

We have web pages dedicated to many of the issues that are important to our members and supporters. Encourage your prospects to check out our website. If they have ideas on what they'd like to see on the web, be sure to have them include that on the back of their pledge forms.

Thanks, Charlie, for being the first solicitor to send a check from a donor! And, a special thanks for including the pledge form.

Win Prizes!

It was recommended last year that we include prizes for our volunteers who work very hard under rather uncomfortable conditions to raise money for the chapter. The abbreviated timing of the campaign caused us to forget about this important element. This year, the campaign will acknowledge solicitors as follows:

- First-time fundraiser
- First one to schedule all appointments (e-mail me or I won't know who's first)
- First one finished meeting donors
- First one to turn in the paperwork
- Person who brought in the most money
- Person who made the most contacts
- Person who conducted the most meetings
- Most unusual story
- Person suggesting the best changes for next year's program
- Best team effort
- Person who returned the highest percentage of $ amount assigned to them
- EVERYONE who includes 100% of their signed pledge sheets
- Person who helps above and beyond the call of duty with the post-campaign follow-up
- Person who complains the least (Jim Riggs' idea)
- A for Effort

We haven't figured out what the prizes will be yet so we'll all be "surprized."

"We improve ourselves by victories over ourself. "
Edward Gibbon, English historian of Rome (1737 - 1794)

Have a great week!

Cheering Them On!

How to Encourage Board Members to Make Their **MAJOR DONOR ASKS**

BY BEN GREGORY

EDITOR'S NOTE: Colorado Conservation Voters (CCV) launched their major donor campaign by training their board members in making the ask, then going into high-gear follow-up. Each week, development director Ben Gregory sent a chatty and cheering email to all the askers.

In order to keep board members motivated, reward those who were successfully completing their asks, and make their fundraising progress visible, they created "The CCV Ask Tree" and included it in every email, along with a "Tip of the Week" to reinforce good fundraising practices.

The tree, shown here, got filled in as asks were made and donations received. Each leaf represented a meeting request or ask letter from a board member. Meetings held were represented by fruit blooming on the tree, and donations received (the green stuff) piled up beneath the tree's branches, as in the second image on the next page.

The emails also reminded askers of some key incentives, such as special gifts and benefits that accrue to their major donors, the fact that people could become major donors by giving smaller amounts over time to add up to a major gift, and the terms of a challenge gift from an anonymous donor.

The weekly tips were a clever way of getting board members' attention and reinforcing the fundraising training they had received by reminding them of asking strategies. But their main effect was to keep people engaged in the process by passing on news about the campaign — each week updated progress toward meeting the challenge gift — and about recent organizational accomplishments. Because the work of board members in a campaign like this is very solitary — the calls and meetings are done individually, as opposed to as part of a group effort as with an event or phone bank — this weekly communication served to keep people feeling connected to the larger campaign, which in turn helped them stay on track with their tasks.

In addition, each email reinforced that help with their fundraising asks was only an email or phone call away. A brief section at the end of each email headlined "Let Me Help You" encouraged askers to contact the development staff for help with letters, donor packets, supplies, research, advice — "anything that will make your fundraising easier."

Gregory's enthusiasm and cheerleading had the desired effect: spurred on by the weekly reminders and encouragement, board members raised more than $13,000 in the three months they had allocated to the campaign.

Following are nine tips board members received over the course of the campaign.

TIP #1: HOW TO HANDLE THE PUT-OFF

When making your meeting request calls, many of your friends and colleagues will have completely valid reasons for not meeting now. The most important thing to remember is to listen to what they say and take it at face value. "I'm too busy right now" means they are too busy right now, not that they won't consider a contribution to CCV. Below are some suggestions for how to handle common responses:

- "I don't have time to talk right now." =
  "When would be a good time to call?"
- "I don't have time for a meeting, can't we do this over the phone?" =
  "The meeting will only last 20 minutes or so and I am happy to come to you. It really helps to meet face to face, but we can do this over the phone if we must."

CCV Ask Tree
BEFORE

- "I'm strapped for cash right now and can't donate $500."=
  "Your contribution is completely up to you. I'd still like to sit down with you and talk about CCV's work and find the appropriate contribution for you."
- "All my money is going to get Obama/McCain/Clinton/Snoopy elected." =
  "This is certainly a big year across the country. I'd still like to meet with you to discuss the incredible influence the Colorado legislature has over environmental policy. Maybe you know someone else who would be interested in investing or would like to support us after the elections."

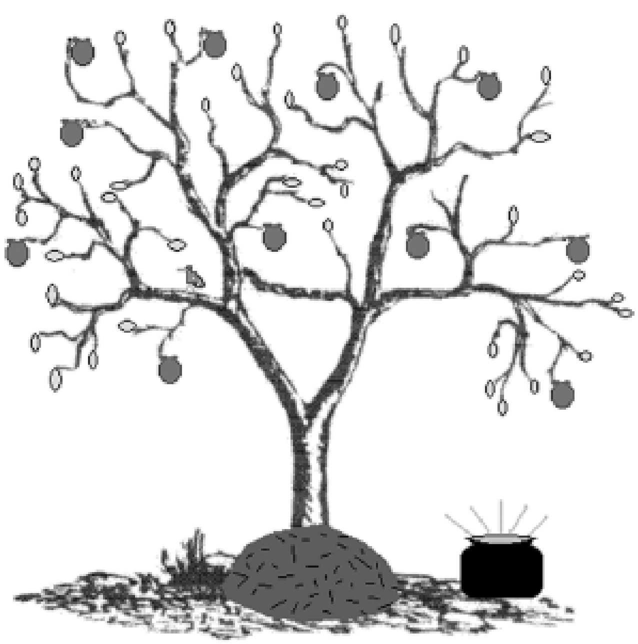
Remember — take what they say at face value and don't miss an opportunity to introduce someone to CCV, even if they might not be writing us a check today.

TIP #2: WHERE SHOULD YOU TRY TO MEET YOUR PROSPECTS?

The proper location for your donor meetings can make a big difference. Here's a list of some of the options and things to consider before you suggest a venue:

The prospect's home — Traditionally considered the best place to make an ask. It is very important that your prospect is at ease and there are few interruptions, making a home visit ideal. You also have the advantage of a more relaxed pace if you wish to linger awhile instead of making the ask in a rush.

The prospect's workplace — The second-best choice, meeting at a workplace, allows you to talk to the prospect on their "home turf." There will be a greater opportunity for interruptions than at their actual home, but it is still a great place for an ask meeting.



CCV Ask Tree
AFTER

Halfway up a fourteener or at your favorite fishing hole — Maybe a bit of an untraditional ask, but what better place to talk about what CCV does than in nature? You won't have the comforts of home, but reminding people why they love Colorado has a lot of value.

The CCV — This one is a mixed bag. The donor is going somewhere new, so they won't be as at ease as at home. On the plus side there are opportunities to see the organization and meet the staff. There are tons of opportunities to show off our campaign pieces and scorecards. If you'd like to meet at the offices, please let me know in advance so I can reserve a quiet spot for your ask.

The lunch meeting — Actually the worst place to make an ask. You will have to deal with constant distractions from your fellow diners, the lemon that your prospect asked not be added to his or her water but was anyway, and the pesky waiter interrupting right as you had started your pitch. And then there is the awkwardness that can come with the check. If possible, try to meet somewhere other than a restaurant or coffee shop.

TIP #3: THE VALUE OF PROPS

One of the advantages of meeting face to face with donors is that you have the opportunity to tell the CCV story with more than words. We have prepared major donor packets that include actual samples of our work — the Scorecard, the Governor's Report Card, campaign pieces, and an absentee ballot mailer. These can be very valuable to illustrate what we do. Also included are select pieces from the Storybank and a Board list to highlight our incredibly talented volunteers.

There is new growth on the tree. Jeff added a leaf through his first meeting letter and John added another fruit with his second successful ask. And there at the base of the tree is a pile of money! The money pile grows every time a Board member brings in a $1,000 or higher contribution. Way to go John! Let's fill this tree out for next week.

TIP #4: SILENCE IS GOLDEN

One of the hardest things to do when you've just made your ask is to give your prospect time to answer. Your donor will have a lot to think about and you should not fill that silence with words out of nervousness. Do whatever it takes to give your prospect a chance to respond — mentally count out 10 or 12 seconds, have a drink of water, whatever. Just give your prospect time to think about it before you speak. And remember it isn't a staring contest — you don't need to steel yourself by staring at the prospect while waiting for an answer. Relax and be natural.

TIP #5: THE PLEDGE FORM IS YOUR FRIEND

Your prospect just said he or she wants to contribute $10,000 and you gave him or her a hearty thank you — now is the time to hand over a pledge form. By getting your new donor to fill out a pledge form we will know when the gift should be made and when it is acceptable for us to follow up with the donor if it hasn't arrived. Two minutes spent going over this form can save weeks of delay down the road as you try to remember what was said and what was committed to at a then-distant meeting. I've attached the CCV Pledge Form to this e-mail for your convenience.

TIP #6: THE POWER OF $85

$85 isn't all that much money any more. It'll get you a couple of DVDs, maybe a season of the Sopranos, and some popcorn. Dinner for three and a couple of drinks at a mid-priced restaurant. Two tanks of gas. Things that a lot of people buy without really thinking about it too much. But $85 a month adds up to a contribution of more than $1,000 in a year. CCV is easily able to accept monthly contributions by credit card. Remember to give your prospects this option when you're making your asks.

This week, two new leaves sprouted from Gary's first asks and John added another fruit by introducing a new donor to CCV. Excellent work, fellas. If only seven new asks are made next week, I'll have to add another branch…let's make it happen!

TIP #7: BLOCK OFF YOUR TIME

We are all very busy people. Between our immensely successful careers, our wonderful friends and families, and our all-important hobbies, it can be tough to find the time to devote to being a volunteer fundraiser. Even professional fundraisers can find that their day fills up quickly before they've had a chance to make their calls. If this has been a problem for you, try scheduling CCV fundraising time into your calendar. Once or twice a week, set aside an hour to concentrate on getting your asks wrapped up, and then you won't have to think about it all the time. Just make sure that when that hour does come around that you stick to your schedule.

TIP #8: PARTY TIME!

Next week, CCV will kick off its 2008 Event lineup with a Birthday Party for longtime volunteer Faith Winter on Thursday. While all of your Board fundraising asks are for significantly more than the suggested donation for these events, you can still use these as an opportunity to introduce your prospects to CCV. Invite your prospects to join you at one of these events, explaining that you are asking them for a leadership gift of $XX and that this is a great opportunity to meet the executive director and the excellent staffers and volunteers who support CCV. You don't want to put pressure on your prospect in public, so it is important to make the ask before the event itself and use this as an informational opportunity.

TIP #9: TELL THEM YOUR STORY

Over the years, each of you has invested a considerable amount of time and your own money in CCV. Your reasons for supporting CCV personally are the most compelling cases that you can state for your prospects because they are closest to your heart. Tell them about why you moved to Colorado, why you care about the environment, or what convinced you to invest in environmental politics.

Another fruit popped up thanks to a gift from one of John's prospects. Good work, John! We still have time to fill the tree before the Board Meeting. Let's make it happen! GFJ

BEN GREGORY IS DEVELOPMENT DIRECTOR FOR COLORADO CONSERVATION VOTERS.

After the Yes: Twelve Questions You Can Ask Donors

By Andy Robinson and Harvey McKinnon

When would you like me to wash your car?

Have you considered adopting an adult?

May I have another piece of cheesecake?

But seriously, folks…

If you're new to face-to-face fundraising, you're probably focusing on "the ask": how to frame your request in the most compelling, inspiring way. Without a doubt, a strong ask is one of the keys to successful fundraising—but then what? When you hear the words, "Yes, I'd like to help," how do you respond?

First of all, be grateful and enthusiastic. Show your heartfelt appreciation. Talk about how the gift will make a difference.

Then it's time for the "after questions."

Not every question below is relevant for every donor or every visit. You're engaged in a conversation or perhaps a negotiation, not an interrogation. Choose the questions that seem most relevant and adapt them to your needs and circumstances.

1. "How would you like to pay? Do you want to write a check now? Would you like us to send you a pledge statement in the mail? Are you interested in signing up for our sustainer program—that way you can fulfill your pledge in automatic monthly installments."

   Many solicitors bring pledge forms to the meeting and fill them out with the donor. The main question above, along with several below, could easily be included on this form.
2. "How do you want us to use this gift?" Check your notes from this meeting and all previous conversations with the donor. If you sense any indications that she wants to restrict her gift to a specific program or campaign, this is the time to clarify and honor that intent.

One of the advantages of engaging individual donors (compared to foundations, corporations, or government grantmakers) is that, in most cases, they can provide general donations to use as you see fit. You want unrestricted gifts whenever possible and need to be comfortable asking for them. If the donor has indicated an interest in earmarking her contribution, however, a skilled asker can sometimes negotiate a broader use of the money. This gives the organization more flexibility while still meeting the donor's goals.

For example, you might say to the donor, "You've expressed an interest in child development, which encompasses nearly everything we do. With the understanding that you want your gift to benefit children and their families, may we use the money to support our children's programs as we see fit?"

If you're seeking restricted funds, before meeting with donors be sure your organization has a gift acceptance policy. It should specify, among other things, the minimum donation that would qualify as a restricted gift. If you set a number that's too low, expect a battle with your bookkeeper—and we support the bookkeeper. (For more on gift acceptance policies, see "Gift Acceptance Policies and Legacy Giving," by Fred Matthews, *Grassroots Fundraising Journal*, Vol. 26, No. 2.)

3. "How would you like to be recognized? We publish donor names in our newsletter, our annual report, and our website. We'd love to include your name so we can publicly express our thanks—and your commitment will inspire other people to give. May we list your name or would you prefer to be anonymous?"
4. "Do you want your gift to honor someone you care about? We can list their name, your name, or both." When preparing your pledge form, include space to collect this information.
5. "Tell me a little more about why you support our work. We're always interested in what motivates our donors to give; this helps us reach out to other potential donors. You just made a very generous decision—I'd really appreciate knowing why."
6. "Would you be willing to give a testimonial we can use in our newsletter and other promotional materials? May we include your photo? Our most generous supporters—people like you—are our most credible advocates. May we have a sentence or two to share with others?" Note: depending on the nature of your organization (and the advice of your attorney), you may require a signed photo release form.
7. "Would you be willing to join us at a board meeting and talk about why you support our work? It's really helpful for the board to hear directly from donors—it reminds them why we do the work we do and why it's important to ask people to contribute. It will inspire them to work harder in support of our mission. Would you share your experience with the board?"
8. "How would you like to be kept informed about our work—and how often? Do you want a printed newsletter or do you prefer brief emails? Shall I phone you from time to time? Do you participate in social media like Facebook? Would you prefer to receive updates in person—and if so, how many times per year?"
9. "When I come back to give you an update, would you be willing to include family members so they can learn about your support of our work?" If you're cultivating donors for future gifts, especially planned gifts, this is an essential step.
10. "Can you recommend other people we can talk to about a gift? Do you have friends or colleagues who might want to join you in supporting our work? Would you be willing to make an introduction—by phone, by email, or in person—or join me for the initial visit?"
11. "Given your strong commitment to our work, would you consider volunteering to help us raise money? For example, would you be willing to come along and talk about why you give when I meet with prospects?"
12. The final question requires some courage, but asking it is a lot better than wading through a series of unspoken assumptions: "What's your personal giving calendar? Are you typically a once-a-year donor? Twice a year? If we have an urgent need, can we approach you again? What schedule works best for you?"

Capture all this information and enter it in your database or other donor management system immediately. Congratulations! You've just created a personalized road map for engaging your donor and honoring her wishes. If you use it, and use it diligently, it will lead to repeated (and larger) gifts. ▪

Harvey McKinnon (harveymckinnon.com) and Andy Robinson (andyrobinsononline.com) are consultants based, respectively, in Vancouver, BC and Plainfield, VT. Harvey's latest book is *11 Questions Every Donor Asks*; Andy's is *Great Boards for Small Groups*. Both are available from Emerson & Church, emersonandchurch.com. Harvey knows more jokes; Andy makes better salsa.