The Major Gift "Ask"

A step-by-step plan for grassroots groups

By Andy Robinson

Seven out of ten people you know—your friends, neighbors, and colleagues—contribute to charitable causes. According to recent data, the median amount they give totals $1,300 to $2,000 per household per year, spread among several nonprofits. People of modest incomes can, and do, make substantial gifts.

If you're looking for good prospects—generous people who care about your issues—they're right in your neighborhood. To paraphrase author and trainer Kim Klein, you, your board members and your volunteers already know all the people you need to know to raise all the money you need to raise. You have the relationships—right now—to meet your financial goals.

Do you want these folks to support your work? The face-to-face request works best because:

- You can talk with prospects to learn how their interests dovetail with the work of your organization.
- By communicating your passion for the mission, you make the case in a personal way.
- You can respond directly to questions or concerns.
- You can bring visual aids-maps, charts, photos, site plans, or blueprints.
- It demonstrates your commitment to the cause. Not only are you giving your time and money, you're showing courage by meeting with donors to solicit their support.

When seeking larger gifts ($500 and up) the most ethical and effective strategy is to set up the appointment in advance. What follows is a three-step process for getting the job done: a letter, a phone call, and—if everything goes as planned—a visit to request the gift face-to-face.

Act 1: The Letter

Let's imagine you're writing to a current donor:

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 that 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 about building your organization, rather than providing services or doing advocacy work)*

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 writing to a prospect, rather than a donor, the relevant paragraphs might be:

As you might know, I'm on the board of the local food bank, 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 a 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.

I have provided sample language, but you should avoid the easy shortcut of simply using this letter. You'll be more effective if you adapt the language and tone to fit your situation. Just keep the following points in mind:

- The letter should be 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.
- Its purpose is not to get money, but rather to get a meeting.

This is a one-page "I want to meet with you" letter—so don't worry about making it perfect. It might make sense for one person, perhaps a staff member, to prepare a standard letter that board members and other solicitors can customize. The important thing is to get it done and mail it out.

Act 2: The Phone Call

For many solicitors, the phone call is the hardest stage in the process. We often think of anything that combines telephones with money as telemarketing, which is universally despised. But true telemarketing involves one stranger calling another. You won't be doing that. You'll be calling friends, family members, colleagues, co-workers, and neighbors. Perhaps you'll be lucky enough to contact your organization's donors, members, and volunteers—people who have already expressed their commitment by contributing time, money, or both. These are not cold calls. This is not telemarketing.

The telephone is a fabulous tool for raising money (as long you don't call complete strangers), but it does have limitations:

- You can't see people, so it's impossible to respond to their body language. Are they leaning forward with anticipation? Are they rolling their eyes in frustration?
- Because talking by phone is less personal than meeting face-to-face, it's much easier for the prospect to turn down your request.
- Many individuals screen their calls or simply don't pick up the phone.

To succeed, you need to be persistent and flexible. Call at different times of day and on different days of the week. I'd suggest that you call four or five times and leave three voice messages before giving up on a prospect. The message goes something like this:

"Hi Mike, this is Andy. I'm following up on the letter I sent last week about our fundraising campaign. I'm hoping to schedule a time for us to meet. Please give me a call at 555-2468. If I don't hear back from you in the next few days, I'll try again. Thanks."

If four or five calls seem like too many, then call three times before you give up. Find your own comfort level. However, calling once, leaving a message and then writing off the prospect is not good fundraising—it's fear or laziness. You can overcome that. You're doing an important job and as long as you're honest, humble, and responsive, no one will think poorly of you. Indeed, many will admire your bravery.

If you're not getting through on the phone, e-mail is another option. Some fundraisers find that e-mail is the best way to schedule appointments, though it has the same drawbacks as the phone: it's a bit impersonal and it's easy to ignore. Having said that, effective solicitors use every tool in the toolbox before giving up on a prospect.

Act 3: The Visit

Believe it or not, you'll actually get to meet with some of your donors and prospects. What follows is a brief overview of the meeting.

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 good transition 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 to your group, 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. Always 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.

This article is adapted from Big Gifts for Small Groups: A Board Member's 1-Hour Guide to Securing Gifts of $500 to $5,000. *Copyright © 2004 by Andy Robinson. Reprinted with permission by Emerson & Church, Publishers. To order, call (508) 359-0019 or visit* www.contributionsmagazine.com . *Andy Robinson is a trainer and consultant based in Plainfield, VT. His other books include* Grassroots Grants *and* Selling Social Change (Without Selling Out). *He can be reached via e-mail at* andyfund@earthlink.net .