Making the Ask

*Best Practices, Trends and Tools for Success*

Presented by

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Presentation Outline

- Fundraising 101 – Quick refresher
- Donor Behavior
- The In-Direct Ask (Letters and Online Appeals)
- The Personal Ask (Phone and Face-to-Face)
- The Answer
- Role-plays
- Discussion
Learning Objectives

#1. To understand that the development process is much more than asking for money.

#2. To become more comfortable with asking for money.
Upon hearing the phrase "ask for money"...
FUNDRAISING 101
Development Process

- Identification
- Cultivation
- Solicitation
- Stewardship
WHERE GIFTS COME FROM

2017 Giving by Source

- Individuals: 71%
- Foundations: 16%
- Bequests: 9%
- Corporations: 5%
OTHER FUN FACTS

- Individuals give the most money!
- 7 out of 10 people give
- People give because they are asked
- Most effective way to ask is face-to-face
- Raising money is all about relationships
BEST PRACTICES

• **Mission-driven and Donor-Centered**
  - Mission means everything
  - Donors have proven it is all about them

• **Be data driven**
  - Track giving by donor
  - The best predictor of future behavior is past behavior

• **Communication** - Interact with donors the way they interact with you (online, mail, phone)

• **Research** – Know everything you can about your donor
Donor Behavior
WHY DO PEOPLE GIVE?

• Someone I know asked me
• I have an emotional connection to the work
• I want to help save or change a life
• Giving is a tradition in my family
• I want to connect to others and build a social network
• I want to leave a legacy
• I want to be seen as a leader in the community
HOW DO PEOPLE GIVE?

• Via mail – in response to a letter
• Online – through your website or an email appeal
• Phone – from a call to your office or your call to them
• Face-to-Face – via personal solicitation
Donor Funnel

- Prospects
- Introductory Gift
- Small-Level Repeat Gifts
- Mid-Level and Loyal
- Major, Capital, or Planned Gift
THE INDIRECT ASK
APPEAL LETTERS

Ask more than 1x per year!
• Personalized; include a reply device; stamp return envelope for LYBUNTS
• 1 page; include a picture if possible
• Tell story about the mission and impact of your org
• Focus on the donor and not the organization
  • Thank you for your support in 2018. You are changing lives in DeKalb County.
• Ask for a specific amount; give a timeline
  • Will you please consider a gift of $100 by April 30th?
  • Reiterate this information at the end of the letter
ONLINE/WEBSITE

• Is your DONATE button prominently placed?
• When prospects or donors are on your webpage are you asking them to consider a gift?
  • Feature your mission and place the DONATE button just underneath it on the HOMEPAGE
  • Share a simple statement about how a donor’s gift makes a difference
    
    https://pencilsofpromise.org/
• Populate the ask amount – be creative about the numbers
• Feature the chance to make a recurring gift
• Ensure that you have a staff point of contact prominently listed to answer questions about gifts
• Adapt your appeal letter; use less words

• Use a picture

• Focus on how the donor makes a difference
  • You helped us provide a restful night’s sleep for over 1,000 people last year.
  • Your gift enables us to feed 5,000 children annually

• Make the ask and link directly to your webpage
  • Please consider renewing your gift of $100 to help the children of DeKalb County. CLICK HERE.
  • We hope that you will renew your gift of $250 to ABC Organization and aid in feeding 5,000 children this year. GIVE DEKALB County is on May 2, 2019. Click here to give.
THE PERSONAL ASK
THE PERSONAL ASK:
Talking to a prospect/donor!
THE PHONE CALL

Less scary...

• Introduce yourself and ask if now is a good time to talk. If it is not, schedule a time to call back.

• Current Donor? Say thank you right away. Share an impact fact. *You helped our organization save 500 animals last year.*

• Lapsed Donor? *Thank you for your past support. I hope that you will renew your $500 gift next month during our Give DeKalb County event.*

• Prospect? *We are so grateful for your connection to our organization. Thank you for coming to events and helping us to spread the good news about our mission. I hope that you will consider making a gift between $25-$100 during the GDC event on May 2\textsuperscript{nd}.*
GETTING THE MEETING
DETERMINING THE ASK AMOUNT

**Getting the meeting – What do I say?**
- Call, email or write a letter. A combination could work best.
- Ask for their input on a project, plan or event (Advice Visit)

*Ben, I would like to come talk with you about a new program we are starting at ABC Organization. Do you have time for coffee or lunch next week?*

**How do you determine the ask amount?**
- Research. Use the tools available to you (Wealth Engine search, the internet, real estate records)
- Good data. Make sure you know the donor’s giving history. If you’re unsure, ask in a previous meeting.
- Understand that the bigger the ask, the longer it takes to get there (Moves Management)
THINGS TO KEEP IN MIND

• It’s not about you.
• Focus on the organization
• How does this gift support the mission?
DO’S

- **DO…** Make your own gift before you ask
- **DO…** Tailor your ask – both in project and in amount
- **DO…** Practice - Role playing builds confidence
- **DO…** Believe in yourself
- **DO…** Believe in the cause
- **DO…** Remember that people give because they are asked
- **DO…** Thank the donor if you get a yes
- **DO…** Do your research; ask for more than you need
DO’S

- **DO**...Ask in person
- **DO**...understand that people give to people, especially those they know and respect
- **DO**...Make the case for investment – put your cause first and communicate impact. Explain where the money goes.
- **DO**...ask for advice
- **DO**...Be an active listener
- **DO**...Prep your volunteers and staff– Write a briefing memo
- **DO**...a contact report after the meeting; track what you learn
DO NOT’S

• DO NOT...Speak after you ask
• DO NOT...take no personally
• DO NOT...Apologize for asking
• DO NOT...think of it as an “ask” but as an opportunity
Anatomy of an Ask

STAMP BEFORE YOU ASK

SMALL TALK – builds rapport...

TRANSITION – “I want to ask you something important today.”

ASSOCIATE – Build a connection, “You’ve been such a great donor...”

MISSION– Remind the prospect of the organization’s mission/impact

PURPOSE – Make the case and help them understand your need

Then you ASK. Make the statement simple and concrete. DO NOT TALK AFTER YOU MAKE THE ASK.

Adapted from Joe Garecht – The Fundraising Authority
Hi Teri, how are you? How are the kids? (SMALL TALK)

Listen, I have something important to talk with you about today. (TRANSITION)

You have been one of the university’s most enthusiastic supporters. In fact, we wouldn’t have a new baseball field if it weren’t for you and Kevin. (ASSOCIATE)

We’re very concerned about the cost of tuition here at NIU. As you know, part of our mission is to help first generation college students receive a top quality education. Last year, we had over 700 students that were accepted and offered small scholarships but still could not afford to attend the university. (MISSION)

Teri, our general scholarship endowment provides only $50,000 per year for need-based scholarships. Our goal is to offer a scholarship to every accepted student who qualifies. We need to raise another $1,000,000 to make that dream a reality. (PURPOSE)

Would you be willing to contribute $25,000 to help us reach that goal? ASK
THE ANSWER
THE ANSWER

YES!

• Thank the donor
• Confirm how the gift will be made and when
• Begin stewardship process

Maybe?

• This is very common. Many donors need to consult a spouse as well as a tax or financial advisor.
• Establish a date for follow-up, “May I give you a call next week?” or “Would you like to meet again in two weeks?”
THE ANSWER

What if the donor says NO?!?

Determine what it means...
• No to the organization?
• No to the project?
• No to the timing?
• No to the amount?

REMEMBER, it is NOT ABOUT YOU
ROLEPLAYS
DISCUSSION
Other Resources

• Joan Garry Podcast - https://www.joangarry.com/fear-asking-for-money-podcast-seth-rosen/
  (Episode #1: The FEAR of Asking for Money) – Subscribe to her blog and listen to all the podcasts “Non-profits are Messy”

• Gail Perry - https://www.gailperry.com/six-steps-perfect-ask/
  (Fired Up Fundraising – subscribe to her newsletter. Very Major Gift focused)

• Asking Matters – Take the Quiz - https://askingmatters.com/