Building a Culture of Philanthropy and The Art of the Ask

Philanthropy and fund development belongs to an entire organization -- every individual: every staff member, every board member, every committee, every volunteer ...

This means that everyone in the organization, from the groundskeepers to the president of the Board understands that fund development and philanthropy are critical to the organizational health AND that each individual has a role in the process.

It is also important that the organization’s volunteers, visitors, members, clients are all treated with utmost care and respect.

This is the culture of philanthropy: An attitude, an understanding, a behavior

Basic Principles of Fundraising

There are best practices for fundraising and they are:

- Acknowledge prior gifts first
- Ask for a specific amount or thing
- Face to Face is most effective

The Basic Tenets for Fundraising are:

- People give to people (corporations/foundations don’t give money; the people who work in them do)
- People give because they are asked

Before you solicit a gift ask yourself the question – Why did I give?

You need to be able to answer that question with a fairly succinct, yet passionate response. In speaking about your passions, you will many times begin a dialogue about the project and your mutual interests in it. Your personal experience is sometimes the most important aspect. It’s not about the building – it’s about mission, helping children, feeding homeless, educating our youth, etc. It is imperative that you make your gift first, prior to asking others for theirs.

Remember:

People don’t give to WHAT you are asking for, they give because of WHY you are asking for it.
Steps to Successful Solicitation

Make your gift first – you can’t solicit others until you’ve exhibited your own willingness to support the organization.

Work in pairs, prepare, practice...

Setting the Appointment

1. Solicitor #1 check your schedule with Solicitor #2 and hold some mutually available dates

2. Solicitor #1 contact prospect and make the call to schedule the meeting.
   You may say something like,
   “Hi Bob, this is Sue. As you know, I’m on the board of XYZ Organization, and we have launched the capital campaign to build/expand/create... our site/building/ endowment... As a supporter of this organization (or as a leader in our community), Elizabeth Jones (Solicitor #2) and I would like to schedule some time to get together in the next week or so. What does your schedule look like?”

Schedule meeting.

   RULE: Don’t let them give their intention over the phone –
   RULE: Try not to do this over a meal or lunch, rather in a quiet place, their office, or their home is always best. (Note: Starbucks is the worst – loud, no seating and inevitably you will end up at different locations) This is a business call, not a personal call.

   Possible response:
   “Sue, you don’t need to meet with me, I’ll just send a check”

   Stop them. Remind them that their gift is important and that you want to sit down with them and discuss the details of the campaign and answer questions. REMEMBER – Especially if this is a major gift or capital campaign ask, you are asking for stretch gifts and should dignify all requests for funding with a visit. It also allows you to educate and invest them in the process and campaign.

   • If they still don’t want to meet, then tell them you will send them some materials.
   • Don’t let them tell you what they are donating, ask them for something specific first if possible. “Please review what I send with an eye to how critical the need is at this moment. We hope you will be able to invest $5,000 this year in the education of our most at-risk youth.’

3. Call Solicitor #2 and give them the time, date and location of the meeting. BE ON TIME! 😊  
   Meet ten minutes prior to the meeting to determine beforehand who will be doing which part of the conversation and practice it. I recommend one person discuss the merits of the campaign, and the other make the actual request. Rehearse the meeting and the request.
The Meeting

A packet including informational material about the event or campaign should include a formal letter and gift intention/pledge card. This will help you in your conversation; use it as a guide for the solicitation.

a) Thank the prospect for the meeting and past support
b) Opening: Discuss the decision to go into a campaign, or benefits of the event
c) Questioning: Ask them if they know much about the project and/or have questions, input
d) Listening
e) Presenting: Discuss the merits of the project and next steps in the campaign
f) Overcoming Objections
g) Solicitation:
   ▪ We’d like for you to lend your name to the campaign, thereby lending credibility
   ▪ We’d like for you to open doors to those who might be interested in this project.
   ▪ Finally, we’d like you to consider a gift of $15,000 over 3 years, or $5,000 a year...

Once you’ve made the request please be quiet.
Let them respond. It is in our nature to justify our request with comments like, “I know it’s a lot of money,” or to get nervous and jabber, but just make the request and hush.

If they say no, it is important to understand that this could mean many different things. If no reason is given, inquire: Is it the project? The amount? The timing...? Remember, many times no really means ‘not right now’.

While most donors have hopefully been vetted to support the project— no is always a possible answer. A good response would be, “We completely respect that answer. Would you help us out be explaining why? It may help us reevaluate our case for support.” They may have a legitimate concern that should be addressed.

Pledge Card
Once the donor responds and discusses what it is they would like to contribute, thank them profusely and have them fill out a gift intention card. If they want to discuss with someone else, leave them with their letter and pledge card and Solicitor #1 should ask, “When would be a good time to follow up with you.” Try to make that appointment!

Follow Up
- Call your contact at the organization to download/process ASAP.
- If the prospect requires any follow-up please mark your calendar or tell staff (ie. need additional information or ‘I will call them back on Tuesday for pledge card...)
- If you are in possession of the pledge card -- send it to the organization’s office.
- Write a personal note of thanks on your stationary. The organization will produce an “institutional thank you letter and the CEO/Board President will also send a personal note.

Remember: You can never say thank you too many times!