

Getting Ready for Face-to-Face Solicitation

The best way to secure a contribution is a face-to-face request by the right person at the right time for the right project at the right amount.

Basic Principles

1. Volunteer-led personal solicitation is estimated to cost 10 – 20 ¢ per \$ raised. Compare that to the cost of direct mail. (20-25 ¢ per \$ for renewals and \$1.25 to \$1.50 for acquisition.)
2. Why do most people give? Because they are asked. It's that simple. You have to ask. But only ask those who care about your cause! (See #3, #4 and #5 below.)
3. Each year, individuals give the largest portion of philanthropic contributions in the U.S. For 50 years, individuals have given between 80 and 90% of charitable gifts, far more than foundations and corporations combined.
4. It's not what you're selling, it's what I'm buying that counts.
 - I'm interested in my interests, my motivations and my aspirations. Match those and then I'll give to you.
 - People read, volunteer and give to what interests them!
5. Don't universalize your own passion. Not everyone is interested in your particular cause, no matter how convincing you are. Find those who share your passion.
6. Don't trespass on personal and professional relationships. Ask your volunteers to use their connections to identify those who are predisposed and build relationships between the cause and those who are predisposed.
7. Volunteers are usually the most appropriate solicitors to ask for charitable gifts.
8. The mission of fund development is to secure donors, not donations.
9. **You** have to give first.
 - "You cannot function with maximum effectiveness on behalf of a cause in which you do not fully believe and to which you yourself have not made a financial contribution." (Paul H. Schneiter)
9. Don't skip any of the steps. (See handout: *Steps in Major Gifts Solicitation*)
10. Practice makes you more comfortable and more skilled! So go do it.

Job of the solicitor (Decide if this will be a solo or team solicitation.)

1. Perhaps help design the ask and confirm the gift request amount.
2. Set up the face-to-face meeting. (Could you just as well ask over the telephone?)
3. Tell the story. Listen and watch the prospect. Answer questions. Listen some more.
4. Ask for the gift – and then be quiet. Listen and watch the prospect. (See the Gift Request Amount on the Prospect Sheet.)
5. Get the answer. (Do NOT leave the prospect a gift envelope, suddenly making this a mail solicitation – which is less effective!) You may need to follow-up later – so make those arrangements.
6. When you get the prospect's answer, report it immediately to the office.

Job of the office

1. Send an acknowledgement letter to the prospect once the solicitor has reported that a pledge has been made. Enclose a gift envelope for the donor to complete and return payment.
2. Follow-up with the solicitors to check on their progress.
3. Prepare solicitor reports and distribute.

Evaluating interest and readiness and designing the ask (See handout.)

Responding to questions and answering objections

From Laura Fredricks: (Buy this book. It's great! *Developing Major Gifts*, Jones & Bartlett Publishers, available on-line at amazon.com or www.jbpub.com)

- Clarify the concern by asking the prospect a question.
- Restate the concern.
- Do not argue with the prospect, just listen.
- Use examples of others who had similar thoughts and how they were resolved.
- Keep the discussion positive.
- Recognize in some instances you may not be able to change the prospect's mind.

Figure out how you will answer objections like these!

1. "That's too much money you're asking me to give."
2. "I wish I had as much money as you people think I have."
3. "I'm really not interested in supporting this project."
4. "I can't give you an answer now, and I really can't say when I'll know."
5. "I have to consult with my life partner, attorney, etc., but I don't think s/he will want me to do it."
6. "You couldn't have picked a worse time to ask."
7. "I don't think I can do this. We are buying a new house and my mother is in a nursing home."
8. "We like to give to many charities, and if we make this gift to you, we will not have enough money to give to others."

The actual ask

Ask for specific amount *OR*

Present 3 different options (e.g., different projects at different amounts) *OR*

Show a gift table and ask the prospect: where do you see yourself?