Creating a 12-Week
Major Gifts Campaign

Philadelphia Free Library
1/28/16, 10:00 – 1:00 pm

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

The Case, Simplified -- Worksheet

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

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

1.

2.

3.

Differentiation: What makes our group unique?

What do we *have* or *do* that no one else has or does? It's OK to think about this geographically: "We are the only group in Washington County that…"

1.

2.

3.

Market segmentation: Who are we trying to reach?

List the audiences we want to reach for any purpose: education, service delivery, fundraising, advocacy, collaboration, etc.

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

What's your favorite story?

Write notes about your favorite anecdote or example that describes the impact of our work. Remember, "Statistics raise eyebrows but emotions raise money" – so go easy on the data and jargon. Pretend you're talking to a friend or neighbor.

Cycle of Fundraising

Building a Donor Engagement Menu

In our relationships with donors, we value:

Donor engagement options. Create a menu of activities for each stage of the relationship:

Identify Prospects

1.
2.
3.
4.
5.
6.

Educate, Cultivate, Involve

1.
2.
3.
4.
5.
6.

The Ask

1.
2.
3.
4
5.
6.

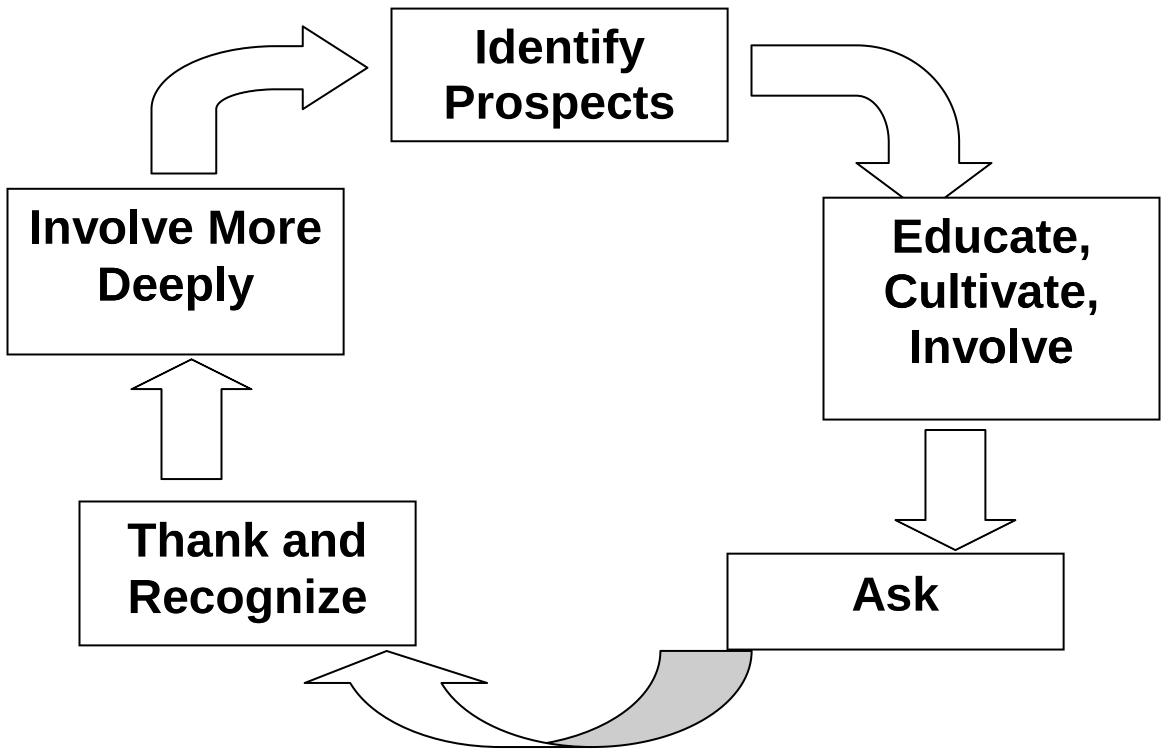
Thank and Recognize

1.
2.
3.
4.
5.
6.

Involve More Deeply

1.
2.
3.
4.
5.
6.

Cycle of Fundraising



Sample 12-Week Major Gifts Campaign Calendar

Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12
ID campaign leadership	Prepare gift chart	ID prospects	Train askers	Send letters	Meet with prospects	Send letters	Meet with prospects	Send letters	Meet with prospects	Follow-up calls to undecided prospects	Wrap-up meeting to evaluate campaign
Set $ goal	ID prospectors to suggest names	“Rate prospects” for $ amount	Assign prospects	Phone prospects to schedule	Thank donors	Phone prospects to schedule	Follow-up calls to undecided prospects	Phone prospects to schedule	Check-in meeting with leaders and askers		ID leadership for next campaign
ID challenge gift	ID askers	Test and modify goal: enough prospects?	Create lines of accountability			Check-in meeting with leaders and askers	Thank donors		Thank donors		Celebration!
Create campaign calendar	Prepare campaign materials	Test and modify goal: enough askers?	Prepare letters to prospects								

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.

"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.

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.

North Lakeland Discovery Center

Cycle of Development: Expanding Your Connection

Naturally Inspiring and Enriching Lives through Meaningful Connections with Nature, People and Community

www.DiscoveryCenter.net • (877) 543-2085 • Contact@DiscoveryCenter.net

Identify Prospects

1. EAD and Staff identify potential foundation grants.
2. Seek and refer board members with fundraising experience.
3. Actively seek potential donors/volunteers.
4. Review donor lists for potential donors who have given to similar organizations.
5. Have a designated person(s) to talk to referrals.

Educate and Cultivate

1. Develop the why through an "elevator speech". Train staff and board.
2. Host donor dinners and events with time dedicated to the DC story.
3. Tours—train ambassadors on "elevator speech."
4. Ask donors to talk to donors, and provide opportunities for roundtable discussions.
5. Create Q&A with common questions, and include how to learn about upcoming events, who to call to be involved.
6. Articles and photos in newsletters (e.g., bequests, memorial gifts; personal stories from participants).
7. Seek out media attention for grant receipts and DC story-telling opportunities.

The Ask

1. Face to face visits (collaborative)
2. At house parties and other events as appropriate.
3. Website, email and social media asks.
4. Letters (e.g., sponsor) and follow up calls.
5. Identify challenge or matching donor gifts.
6. Make calls supporting a special event.
7. Solicit/give items for silent or live auctions.
8. Recruit new members.

Thank and Recognize

1. Board makes quarterly calls to new donors $250+.
2. Informal thank you's (e.g., at event or program).
3. Invite and recognize sponsors, item donors and volunteers at summer recognition events.
4. Host Voyageur Dinner and Member Appreciation Night/Annual Meeting.
5. Publicize names of supporters in annual flier and otherwise as appropriate.
6. Send donors CDs, DVDs and other visual gifts thanking them.
7. Personalize gifts and notes.
8. Encourage attendees at events to patronize supporters and sponsors – and frequent their establishments yourselves.

Inclusive Involvement

1. Train volunteer-donors to give Center tours
2. Ask donors to assist, lead or invite them to programs and events.
3. Invite donors to join Board, committees or focus groups.
4. Ask donors to write a story for newsletter on personal importance of DC.
5. Ask donors to host house parties in concert with board members, and to make intro/open doors.
6. Ask donors for feedback on planning, fundraising, and other organization-wide initiatives.

***The System:** A volunteer and donor tracking database is key to providing personalized attention and to communicating respectfully.*

Philanthropy in America

***2014:* $358 billion in private money was given to nonprofits. (Does not include government funds or earned income.)**

Where did it come from?

• **Foundations**	**15%**
• **Corporations**	**5%**
• **Individuals**	**72%**
• **Bequests**	**8%**

More than half of this money came from middle class, working class, and poor people – in other words, people like you.

- **68-70% of households contribute**
- **The typical household supports 5-10 organizations per year.**
- **The median amount contributed per household is $1,300-$2,000 per year.**

Sources: *Giving USA*, www.givingusa.org; *Grassroots Fundraising Journal*, www.grassrootsfundraising.org, National Center for Charitable Statistics, nccsdataweb.urban.org.

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.

Sample ask language

Asking a friend:

"As you you might know, Sally, I'm involved with [name of group] and one of my roles is fundraising -- so I'm contacting my friends to see if they can help. Asking for money is a little awkward, but I'm really excited about the work and I want so much for our group to succeed. If you're willing and able to make a donation, that would be great. If you have other priorities, I respect that -- you and I will be friends regardless of whether you say yes or no. But I sure hope you can help."

Asking a friend for a practice session:

"Sally, I just got back from this fundraising workshop where we learned how to ask for money face to face. It's a bit scary, but I'd really like to learn how to do it well -- so I'd like to come and practice on you. It's a real ask -- I hope you'll contribute -- but frankly, more than the money I need your feedback. I trust that you'll give me good advice. When can we sit down together?"

Framing the ask:

"As you know, I had three goals for this meeting. I wanted to give you an update on our work, and we've done that. I wanted to learn more about your interests and concerns, and I thank you for sharing that with me. And, as you know, this is a fundraising visit -- I'm here to ask for your financial support. We were hoping you would consider a gift of $____. What do you say?"

House party ask:

"Jane, that was a terrific presentation. Every time I hear about our work, I feel more enthusiastic. It's a privilege to be connected to this organization. As you can imagine, I would not have opened up my home unless I felt deeply about the value of this work -- and I do.

"As you know, this is a fundraising party, and we've set a goal tonight of $____. That sounds pretty ambitious, but I'm looking around the room and I count ____ people – which means that if each of us gives an average of $____, we can reach our goal. If that's more than you can give, please contribute what you can. If you can give more than that, terrific. The amount is up to you – my only request is that whatever you planned to give tonight, give a little more. It will make a big difference.

"I'm going to start things off with a gift of $____. Let's get out those checkbooks and pledge cards, and I hope you will all embarrass me with your generosity."

TOXICS ACTION CENTER

Goal $200,000

Gifts Needed	Gifts In Hand	Gift Amount	TOTAL
1	☐	$20,000	$20,000
2	☒☐	$10,000	$40,000
6	☒☒☒ ☐☐☐	$5,000	$70,000
10	☒☒☒☒☒ ☒☒☒☐☐	$2,500	$95,000
15	☒☒☒☒☒ ☒☒☒☐☐ ☐☐☐☐☐	$2,000	$125,000
20	☒☒☒☒☒☒☒ ☒☒☒☒☒☒☐ ☐☐☐☐☐☐	$1,500	$155,000
25	☒☒☒☒☒☒☒ ☒☒☒☒☒☒☒ ☒☒☒☐☐☐ ☐☐☐☐☐	$1,000	$180,000
25	☒☒☒☒☒☒☒ ☒☒☒☒☒☒☒ ☒☒☐☐☐☐ ☐☐☐☐☐	$500	$192,500
30	☒☒☒☒☒☒☒☒☒ ☒☒☒☒☒☒☒ ☒ ☒☒☒☒☐☐☐ ☐☐☐☐☐☐	$250	**$200,000**

TOXICS ACTION CENTER

Goal $200,000

Ways to Give

Check
The simplest and easiest way to make a contribution to Toxics Action Center is to make a single full payment by writing a check today.

Credit Card
You can make a contribution today with your MasterCard, Visa or American Express credit card.

Installment Gifts
One terrific and manageable way to support our work is through an installment gift to Toxics Action Center. You can automatically break your gift into smaller monthly or quarterly installments through a checking or credit card account. Neighborhood Defenders give a small gift monthly gift that automatically renews, allowing us to plan for the future and keep our costs down.

Gift of Stock
You can give a gift to Toxics Action Center by giving stock. You will need to speak with your stockbroker and instruct him/her to transfer stock to Toxics Action Center accounts. Call 617-747-4389 for our account number.

Planned Giving
Consider making a bequest to Toxics Action Center in your will and leave a legacy that will help New England's environment and communities for decades. We also welcome gifts of real estate, used vehicles and life insurance. For more information on a planned gift, call Marilyn at 1-800-841-7299 x312.

Toxics Action Center's tax ID #04-3211693

*Contributions or gifts to **Toxics Action Center** are deductible as charitable contributions for federal income tax purposes. Contributions to **Toxics Action Center Campaigns** are not deductible as charitable contributions for federal income tax purpose.*