

## Tips for Gift Solicitors

### Listen

Listening to the prospect is just about the most important ingredient to a successful request. What the prospect says and how you respond will carry the day.

Listen rather than talk about half of the time. Use active listening to draw out the prospect's latest and strongest interests in your area.

As you hear the prospect's concerns, shape your words to his or her interests. No matter how well you know the prospect, or how thorough the research, something may have happened at the last minute that changes everything.

Example:

Donna Hunter, who was at the time the executive director of the Women's Inter-Church Council, tells of a visit she made. At the time, they had identified several women of substance and faith who they hoped would help launch an endowment fund. One of the women was an old friend of hers, who will remain nameless here.

I hadn't seen her for a long time, but had put her name forward and agreed I would go and see her. We had agreed that we would go in twos, so I went with another friend, a board member, who didn't know her. My friend met us at the door as graciously as ever. She had prepared coffee and muffins for our visit that morning. She listened patiently as the board member told her our story. Then when the time came, I told her we had come to ask her for \$25,000.

She quietly looked at me and said, "Donna, I'm sorry that you didn't know. My husband died two weeks ago. I'm simply not making any commitments at this time." Her husband was a lawyer in a major downtown legal firm. But he had died with no insurance. The next time I met her, she was looking for work. Her financial situation had changed completely, from one of wealth and privilege to one — certainly not of poverty — but of modest income. How heartsick we both felt. We wrote her a note afterwards acknowledging how we felt intruding on her, and thanking her for hearing us out. It didn't keep us from going on to visit others. But we were always much more careful to listen to people before we talked.

Others have had similar experiences. Sometimes they were positive: news of a newly born grandchild, of someone graduating, or reaching a milestone. Sometimes it has been unexpected tragedies. Sometimes it has been a change in the way the prospect views the world.

### Don't Try to "Sell"

Use no pressure and no guilt. Don't beg. Don't push the prospect to do something he or she doesn't want to do. Instead, offer the prospect an opportunity to fulfill his or her own good intentions.

Emphasize the people whom the prospect's gift will help, not the organization's needs. Look for win/win results, where both parties involved feel they've gained. If the prospect isn't genuinely pleased to contribute, his or her support will be short-lived.

Also, reinforce the prospect's personal relationship with you, as an individual volunteer who asks — the gift may be given because you asked, not because of a deep commitment to the organization's work. Donors may give because they trust you, or care about you — or even because they want to do business with you.

Protect the group's long-term relationship with the prospect — and your own — over any short-term fundraising needs.

### **Be Enthusiastic**

The prospect may decide to give just because your own positive feelings are infectious. “We respond to enthusiasm”, Lyman Henderson says. “I like to see someone who really believes they're hot.”

### **Give the Prospect Positive Choices to Make**

Invite the prospect to tell you what aspects of your work she or he likes best. The following process is known as a decision-making tree:

*Offer choices in pairs* — never more. It's too complicated to make quick decisions based on three or more options.

*Never ask a question that can be answered yes or no.* In particular, avoid asking “Will you donate to this?”

Instead, *ask questions with two equally good alternatives.* Either answer should suit your purposes. This is called a double-positive decision. As an example, let's use a nonprofit that performs musical concerts in public and in schools. The fundraising volunteer, Ruth, meets the prospect, Richard. She hopes he'll give about \$2500.

*Ruth:* Richard, now that you've heard about what we do, which would you prefer to help: children or adults?

*Richard:* The adults could probably pay their own way. But you know, I have a soft spot for the kids.

*Ruth:* That's great, Richard. I agree, the kids are important. Which do think is more important: sponsoring low-price tickets for children to come to performances, or taking the musicians on tour right into the schools?

*Richard:* I remember when musicians came to my school when was a kid. That made such an impression on me.

*Ruth:* Me too! We can send the musicians to the same school three times for an in-depth experience, or we could send them to three different schools. Either costs about the same, \$2500 to \$3500. What makes more sense to you?

*Richard:* Send them back to the same school, if you want my opinion. I don't care much for the quick approach.

*Ruth:* The teachers want them to go in September, November and March. We'd prefer to have secure funds at the beginning, of course, so we can make plans, but we could make arrangements if we knew that a pledge was coming in. If you were sponsoring them, would you prefer to make a single donation, or to spread it out between now and March?

*Richard:* I know what you're doing here, Ruth. But you can count on me. I'll give you my check now.

If Richard had given the alternative answer to any of these questions, it would have been just as positive. Every decision was a good one, as far as the musicians and the audience were concerned.

## **Be Sure to Ask for the Gift**

Be prepared to ask for the donation directly. This is the hardest part for many people. Don't be vague, hinting that you hope the prospect will be generous. Don't present a huge shopping list, offering choices at every level.

“My gosh!” Lyman Henderson said. “If you don't ask, you don't get. We have had approaches of somebody going through a whole demonstration of the kind of thing they're doing or building or mounting, and they never ask.”

Example (related by well-known fundraising professional, Jerold Panas):

It is probably best that he remain nameless. I think he would prefer it that way. He is the popular minister of one of the nation's largest churches. Recently, at a small gathering of other ministers, he related this story... Our minister friend spoke with some emotion; he had just the day before learned one of the greatest lessons of fundraising. The memory was still vivid.

The wealthiest member of his congregation, a widow, was in the hospital. A long-term illness was, sadly, moving at its slow pace to end her life. The minister made regular calls over a period of nearly three months, at least two times a week and often more than that. “Let's be honest, gentlemen,” said the minister to the group. “I considered it my pastoral duty to visit with that faithful servant, one of the most active women in my congregation. I wasn't unmindful, however, that she was also of immense wealth and that because of her long years with our church, we were certain to be the beneficiary of her large estate. There were no children, no relatives, only her great, abiding love for our church. She often spoke to me, even before her illness, of all she hoped to do for the church.

“I visited her faithfully, week in and week out. I brought her spiritual encouragement, often small gifts like stationery, and held her hand while I prayed with her. It was a ministry of love. She was easily one of the most popular women in the congregation and one of my long-time favorites.

“Finally, after all of that suffering, the end came and she slipped quietly into the night. There would be no more suffering. That was about a month ago. Yesterday, I found out from her attorney — also a member of our congregation — about the disposition of her estate.

“While in the hospital, she had arranged her affairs. She left her entire estate to a... university, her husband's *alma mater*. I was incredulous and I must say, God help me, more than disappointed. What happened? I asked the attorney. It turned out that the priest who was the president of the university came by the hospital one day for a visit. He asked her! That's all he did. He asked. It occurred to me that in all of the time I had known her and in all my visits, I never asked for a gift. I took that for granted.

## **Ask the Person to Give a Specific Amount**

Strategically, it is important to ask individuals to give a specific amount or to give within a range. This number is chosen on the basis of research on the person's previous gifts, ability, and interests. If in doubt, ask big.

Talk about the “think about” figure. The phrases that follow are not meant as scripts for you to memorize; they are guidelines only. Rephrase them in your own words. (See examples following)

Examples:

I hope you might want to become one of our lead givers for our campaign. (Mention the various campaign line items and their costs.) Your gift in the range of \$25,000 to \$30,000 would effectively cover the cost of (or partial cost of)..... You might be in a position to give more than that — and of course the seniors would be glad if you could. You might prefer to give less right now. What would you think about a gift of \$25,000 to \$30,000?

or

We don't know what you might be capable of contributing and we're sensitive to how many requests you face. I'm asking you to consider a donation in the \$250 range.

or

We are hoping that you will see your way clear to giving \$500 to \$750 to this campaign. This will demonstrate to others your leadership and commitment.

or

If you could give \$50 to \$75 a month for three years...that would mean...

or

We are hoping you might consider a gift in the range of \$\$ to \$\$\$ . Some of our members who have already pledged are thinking about meeting their pledge partly through a gift of stock and partly through monthly payments for the next three years.

or

We are hoping you will consider a gift in the range of \$500 to \$750. One person suggested to me that they were going to approach their pledge as a sort of spiritual exercise. They are going to give up one of their (fill in the blank—daily Starbuck's lattes for the next three years, which at \$5 a week will easily add up to the \$750 they'd like to contribute over the next three years for the campaign.

### **After You Ask, Be Silent**

After you have asked for the donation, keep silent until the prospect speaks. No matter how long it takes, keep waiting quietly and patiently. Let the person think. A fundraiser had this fundamental rule reinforced the hard way:

One helpful tip the experts taught was hardest to learn: Don't talk first after asking for the gift. Alas, I have rushed in with a flurry of words after only a brief moment of silence. In my discomfort, I have even provided a reason why the prospect could not possibly make a gift in the amount suggested.

By breaking the silence I never knew if the request was in the ballpark or if the potential donor had questions or objections that needed to be answered.

## **Prepare to Ask for a Donation Several Times**

You may have to ask for a donation several times before the decision is made. The prospects may ignore the request, if they aren't ready yet. They may come back to you with more questions. They may change the subject. They may tell you they need time to think about it.

Some experts suggest asking as many as seven times. Don't worry about counting. Instead, focus on being sensitive to the situation. Some volunteers push too hard for a decision before the prospects are ready. Others, equally inappropriately, are so nervous that they are eager to leave at the first hint the prospect might say no. Find a comfortable balance in between.

## **What If the Prospect Says Yes, No, or Maybe?**

No matter what the prospect decides, it is vital that you respond correctly. Future gifts, possibly worth far more than you asked for this time, could be riding on your follow-up technique.

### **If the Prospect Says Yes**

The prospect immediately agrees to the gift. Wonderful!

## **CAUTIONARY TALES from Other Campaigns**

### **The Case of The Running Mouth**

One nervous volunteer solicitor was so relieved to get a friendly hearing and a nice donation that he contracted a sudden case of verbal diarrhea. "What a relief!" he blurted. "We were afraid you were going to ask about the scandal when..." Too late, our inept solicitor retreated to an embarrassed silence, as the prospect reached to take back the cheque and asked for the details.

*Here's what you should do:*

First, acknowledge and appreciate her generosity. This may sound obvious, but people often forget to say thank you.

If this is a pledge, fill out a pledge commitment card and ask the prospect to sign it.

If she doesn't have her chequebook, return and pick up a cheque from her. Try to keep matters in your hands. Many a donation falls by the wayside if left with a busy person.

Some fundraisers believe that the only thing to say after the gift has been committed is "Thank you!" Certainly, if you are not sure what else to say, you would be well advised to express gratitude and shut up.

With good planning, much more can be done.

## **The Case of the Little Big Shot**

One asker we'll call Peter reported that the donor, Mr Bigshaught, had the check all made out when he arrived for the meeting. As they sat down, Mr Bigshaught passed the folded check across the table before Peter could say a word.

Peter put the donation in his pocket without looking at it, made small talk for a few minutes, and left. Once outside, Peter examined the donation, and was disappointed to find it was much less than hoped for.

Peter could have handled the situation differently. Here's one example. Peter could have handed the cheque back to Mr Bigshaught without looking at the amount. "Mr B," he should say, "hold on to your donation for the moment. There are some pretty exciting aspects to this campaign that you may not know about. These could affect the level of your gift. I'd like to take five or ten minutes to discuss these with you before you make a decision, if that's okay with you. Do you mind taking the time? I don't want to put any pressure on you — I just think you'll be interested."

If Mr Bigshaught gives permission, Peter could then make the appeal as originally planned. It might result in a larger cheque. Of course, Mr B could just pass back the same cheque, or even give less! If that happens, you will at least know you tried.

If Mr B says he's too busy to talk right now, try to set another time when he is free, so you can come back for the full discussion.

Of course, if Mr B says he's already made up his mind, there's no point in pushing harder. Accept the donation in good grace. Then plot a cultivation strategy to allow someone influential to go back and appeal for another, larger gift. This repeat visit could happen in as little as six months — even sooner, with the right asker. It might take years to arrange.

## **The Case of Bad Feelings**

Sally had a different problem. Her prospect, Dr Feelgood, listened to the whole pitch, then promised \$100.

Sally was expecting \$750! The doctor had given other nonprofits in town much more, and Sally couldn't understand what had gone wrong. Dr Feelgood had seemed so interested in the presentation, and had looked interested to the end.

The brave approach would be for Sally to say, "Dr Feelgood, I had honestly hoped that you would give substantially more. Could you take a moment and explain to me — is there something that I said wrong, that discouraged you from giving? Or is there something else that I'm not aware of?"

Dr Feelgood, at that point, might provide some useful information that could allow Sally to either reopen the discussion immediately or approach him again at a later date.

If she learned that Dr Feelgood would indeed like to support the project more generously, but simply didn't have the funds right then, she could suggest monthly payment plans or post-dated cheques. The doctor might genuinely welcome the opportunity to be generous without being under a financial burden.

In another approach, Sally could have encouraged the doctor to support her group in other ways that would not require cash. They could use volunteer time, for example, arranging introductions to medical colleagues. They could even use an in-kind donation of the doctor's old computer.

### **The Case of the Consultative Prospect**

Kim had an apparently positive meeting with the judge. Clearly, there was a great deal of interest. But at the end, instead of saying yes or no, Mrs Judge said, “I need to talk about this with my husband. We always make our decisions together. I'll let you know.”

If you ever find yourself in Kim's shoes, say something like this: “Mrs Judge, I'm glad you're giving this such serious consideration. A big gift is a big decision, and of course, your husband (or, if the case is reversed, “your wife”) should be consulted. Your husband may have a lot of questions. Let's set a date when I can come back and talk to you both together, or if you prefer, to him alone.”

Please note: If you had done your research well, you might have seen this coming and arranged an appointment with the pair of them in the first place.

If the prospect refuses to allow you to meet with his or her spouse (or business partner or colleague), your next step is make sure that they have all of the information they'll need to present the case on your behalf. If there are presentation materials, try to leave them behind. Ask the prospect if he or she can think of any particular questions that his or her partner might raise that you should anticipate.

Finally, don't leave it up to the prospect to get back in touch with you. It's very important to set a date by which the decision will be made.

You might say, “Could we talk about it on [name a date within the next two weeks]? I'll be back in the neighborhood on that day. Will it be convenient for me to drop in then?”

You could say, “Our team is having a report meeting soon, and I'd love to let them know your decision. The meeting is on [such-and-such a date]. Could I check in with you the day before?”

If these strategies fail, simply ask the prospect to name a date that would be most convenient for him or her.

### **The Case of the Answer that Was Too Good**

Jean had a problem — Mr. Levesque asked a question that she couldn't answer.

Jean hadn't been very keen on making this fundraising call in the first place. So at the very first hint of a question, Jean promised to research the answer, packed her briefcase and left.

Mr Levesque, who was just asking an idle question, was startled. Jean, however, took the question very seriously and went off to do two weeks of in-depth research, preparing a detailed report for Mr Levesque. The research was so much more fun than fundraising — at least, in Jean's mind.

When they finally got back together after a great many calls and juggling of busy calendars, Mr Levesque was half pleased to receive such a detailed answer to his question but a little concerned that the organization would squander its resources in this manner.

The result? The donation Mr Levesque made was much smaller than expected. Jean was angry that all her research work was valued so little. The nonprofit was disappointed.

Before showing what Jean should have done, let's look at a similar situation.

### **The Case of the Professor who Knew Too Much**

Another fundraiser we'll call Ricardo tried a completely different approach when he approached a potential donor. The prospect, Professor Parker, asked a few questions. Ricardo wasn't quite sure of the correct answers. He did vaguely remember that somebody had mentioned something about this to him once before, so he gave his best approximation of the answer. In other words, he made up the facts.

Unfortunately for Ricardo and the nonprofit group, Professor Suzanne Parker was a world- renowned expert on this subject. She knew the real answer — she'd just been testing.

No donation at all that day! Or for years to come.

So what should Jean and Ricardo have done?

Never lie, make up answers or obfuscate. If you don't know, say so. Most prospects will appreciate your honesty.

Write the question down and repeat it back to the prospect. They'll appreciate that you're taking it seriously. Say something like, "If I understand correctly, what you want to know is..."

Then ask, "Do you need to have this information immediately, or should we continue our discussion?"

Chances are good that the prospect will respond, "Let's continue."

If that's the response, continue on and try to get the donation on the spot. You can certainly get back with the answer later, but it's entirely possible that the prospect does not need that information in order to make a decision right away.

The prospect may say, "I really do need to know that. It's a critical point." You have two options:

- The most impressive is to ask if you can borrow a telephone and call one of your contacts (at home if necessary), ask the question and report the answer back instantly.
- If that isn't possible, note the question. Check again whether you should cut the discussion short at that point, or whether you can continue the conversation, "so I can discover if you might have any other questions I should research at the same time." If the conversation continues, the prospect may very well decide to donate without an answer. If not, arrange a date to come back with the information.