Designing a 12 Week Major Gifts Campaign

SV Creates

San Jose, 11/29/18, 1:00 – 4:00 pm

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)

BREAK

Step 4: Recruit and train askers
- Modeling the ask

Step 5: Identify and assign prospects

Step 6: Engage prospects
- Letter/email
- Phone/email
- Visit (Trio Ask exercise)

Step 8: Hold each other accountable

Step 9: Celebrate and evaluate

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.

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 purposes.*

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								

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.

Who's a prospect?

Ability: **Do they have any money to give?**

Belief: **Do they care about your issues, programs, constituency, etc?**

Contact: **Do they have a relationship with any of your board members, staff, donors, or key volunteers? Are they already contributing money, time, or both?**

If people meet these three criteria, they are PROSPECTS and should be asked to contribute (or perhaps to contribute more).

Prospect Form

Name/contact info	Relationship to me	Believes in cause?	Gives to nonprofits?	Gives to us?	Gift range
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					
14.					
15.					

Rating Your Prospects (Pizza and Beer)

2:00

If you're organizing a face-to-face fundraising campaign, eventually you have to sit down together as a team to discuss assignments. This exercise will help you prioritize potential donors for personal solicitations. By the end of the meeting, most prospects will be assigned to specific askers—presumably the people participating in the meeting.

As you'll read below, you can also use this moment to test the feasibility of your campaign goal. If you don't have enough prospects (or enough askers to engage those prospects) you're unlikely to meet your target. In that case, you need to identify more prospects, more askers, or both—or lower your goal.

Why Do This Exercise?
Before launching a major gifts campaign, you need to decide who will ask whom and how much to ask for

Use This Exercise When
You are ready to test the reality of your fundraising goal and start making assignments

Time Required
About 2 hours. It can take more or less time, depending on the number of names to be discussed and the skill of the facilitator in keeping everyone on task—because this exercise can easily degenerate into idle gossip and speculation

Audience
The leadership team for your fundraising campaign: some combination of board, staff, and volunteers. This exercise can be done with as few as three participants and as many as a dozen. In general, the more involved, the more productive the process

Setting
A private room with enough wall space to hang five or six sheets of flip chart paper. Because you will be discussing donor names and ask amounts, privacy is important

Materials
- Flip chart paper and markers
- A gift chart for your campaign; see Building a Gift Chart on page 88
- Prospect lists developed through the ABCs of Identifying Prospects on page 106
- A list of *current donors* who give at one of the gift chart levels or might be able to contribute at one of those levels. Remember, donors will typically give five to ten times more money in person than they'll send through the mail.
- Bonus item: published donor lists from peer nonprofits that operate in your area. You can find them in nonprofit newsletters, annual reports, event programs, and websites. These lists are often segmented by gift size, which

will give you some sense of a prospect's giving potential. (It's worth noting that top-tier gifts go to organizations that meaningfully engage their donors and prospects, rather than those that only contact donors to ask for money.)

- Food and beverages for the participants.

FACILITATING THE EXERCISE

A client calls this the "pizza and beer exercise" to highlight its informality: sitting around with colleagues, talking about people you know, estimating how much money to ask them for, and figuring out who will do the asking. Alcohol is optional; food, probably not. Given the nature of the work, everyone must swear the confidentiality oath: whatever is discussed in this meeting must remain confidential—which might be an argument against serving alcohol.

1. Post several sheets of flip chart paper on the wall. At the top of each page, write an amount from each line of your gift chart. For example, one sheet might be marked $500, the next $1,000, the next $2,500, and so on.

2. Hand out your gift chart, prospect lists, and published donor lists from peer nonprofits. Give everyone a few minutes to read through the names and ask any questions; don't spend too much time (yet) discussing specific prospects.

3. Start with your highest gift level; for example, "Let's begin with $25,000. You've read through the lists —who might be able to give a $25,000 donation?" This involves a certain amount of guesswork, but the collective wisdom of the group tends to keep the numbers realistic. ("Boy, I'd have to disagree about Jerry. I think he's more of a $5,000 prospect.") If you've collected lists from other groups, you can always check your guesses against a particular donor's gifts to peer organizations.

   Keep pushing participants to add more names: "Is there anyone else we could approach for a gift that size?" Once you've written all the names for that amount, move down through the levels, writing names on the relevant pieces of flip chart paper. You may find yourself jumping from chart to chart as people suggest prospects.

4. After recording all the names, review the list a second time and make assignments. "Ed, you mentioned Sandy Yang. Are you willing to be the solicitor? Great—who would like to help Ed with that one?" As a general

rule, pairing up solicitors—usually a staff member plus a trustee—is a good strategy but not essential.

Because this is a brainstorm—and because people are squeamish about fundraising—not all prospects will be assigned. That's okay. The following step will make sure you end the exercise with appropriate expectations.

5. Finally, it's time to reality-test your campaign goal. A simple way to do this is to add up the cash value of all *assigned* gift amounts—in other words, any prospects with a solicitor assigned. If you have ten assigned prospects on the $1,000 page, write $10,000 on the bottom of the sheet. Repeat this on every page, then add the total from all pages and *divide by two*. This is your feasible number.

   By dividing the total by two, you're accounting for solicitors who don't follow through, donors who choose not to meet, and those who give less than anticipated.

   By the end of the meeting, you should have a good sense of whether your goal is achievable. If it's not, you have several options: identify more prospects, identify more askers who will accept assignments, lower your goal, or start asking the people you've identified and see what happens.

6. To debrief this exercise, ask the following questions:

   - How is everyone feeling about our goal? Is it achievable? Why or why not?
   - To the best of our knowledge, are these donors ready to be asked? If not, what additional cultivation steps can we start now?
   - Did anything take place during this exercise that surprised or inspired you?

TRAINING TIP This exercise can easily degenerate into idle gossip, so keep everyone on task. One way to achieve this is to set a time limit for each prospect and recruit a timekeeper: "We're going to limit ourselves to 30 seconds per name. Marvin, would you be willing to help by keeping track of the time?"

10

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.

Do I Hear Any Objections?
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.

Trio Ask

We know a skilled trainer who calls this "the Cadillac of role plays"—expansive and comfortable, but one requiring some energy to make it run. In addition to the solicitor and the prospect, it includes an observer who functions like a backseat driver ... but in a good way.

When training clients for donor meetings, we return to this exercise again and again because it provides the best preparation for what they're likely to experience during a real visit.

Before organizing this exercise, we strongly urge you to take your colleagues through Face-to-Face Fundraising: Structuring the Meeting on page 137.

Why Do This Exercise?
Because it provides the most specific, detailed preparation for conducting donor visits

Use This Exercise When
You have donor meetings scheduled ... soon!

Time Required
60 minutes

Audience
Anyone involved with your fundraising campaign who will participate in donor visits: some combination of board, staff, and volunteers

Setting
A quiet room that's large enough for your group to form triads and easily hear one another speak. If the weather's nice and you have an appropriate location, those teams who wish can move outside for the role-playing portion of the exercise.

Materials
- Flip chart paper and markers
- Completed Prospect Form (page 109)
- Sample gifts charts (pages 90-91) or a gift chart you've prepared specifically for your fundraising campaign
- Handout: Face to Face Fundraising: Structuring the Meeting (pages 140-141)

FACILITATING THE EXERCISE

1. In advance of the session, prepare two flip chart pages. On one page write:

    Structure of the Donor Meeting
    A. Briefly build rapport
    B. State your goals for the meeting

C. Uncover the prospect's interests
D. Make a brief presentation
E. Ask for the gift
F. Uncover any objections
G. Close the meeting
H. Report to the office

On the second page, draw a triangle and then at the corner of each triangle write the words *Asker, Prospect,* and *Observer.* Below the triangle, write the following:

1-2 minutes	Set up the roles
5-6 minutes	Role play
4-5 minutes	Debrief in your small group

2. Make sure your participants have already completed the ABCs of Identifying Prospects exercise on pages 106 and filled out the prospect form on page 109.

3. As you begin the exercise, ask your trainees to form groups of three. If both board and staff are participating, it's helpful to have a mix of board and staff in each triad.

4. Explain the roles to be played:

   The asker. A board member, volunteer, or staff member who helps with fundraising.
   The prospect. A current or prospective donor who is known to the Asker—in other words, he or she has a direct personal relationship.
   The observer. The team member who gets to watch and comment after the role play is complete.

   By the end of the exercise, everyone will have the opportunity to play all three roles.

   Note: If you form triads and one or two people still remain, this exercise works with groups of four—you'll have an extra observer in each group, and therefore the exercise will take a little longer.

5. Explain the specifics of each role by reading aloud the descriptions below.

   Asker – your goal is to:
   A. Introduce the work of your organization.

B. Find out, through asking questions, what the prospect cares about and how your work might address his or her interests.
C. Encourage the prospect to agree to a next step:
    - Make a gift or a pledge *(this is the primary purpose of the meeting, so start here)*
    - Schedule a follow-up meeting with the prospect's partner or spouse
    - Suggest other prospects
    - Volunteer to help with program or fundraising needs

Prospect – your goal is to:
A. Learn more about this group without spending a lot of time.
B. If you can, identify one aspect of the group, the project, or the presentation that catches your attention.
C. Provide two or three objections or obstacles for the solicitor to address.
D. Based on the conversation, decide if you will:
    - Contribute or pledge today
    - Delay your decision ("I'd like to think about it")
    - Decline to donate
    - Become involved in some other way

Observer – your goal is to watch, listen, take notes, and be prepared to comment on what you see and hear during the debriefing period.

6. With the group, review the flip chart notes describing the structure of the meeting, talking your group through the specifics. You can augment this conversation by distributing the handout Face-to-Face Fundraising: Structuring the Meeting on pages 140-141.

7. To begin the role play, the trios divide up the roles for the first round. The asker reviews his or her completed prospect form (page 109) and chooses one person on the list, or simply picks someone in real life that he or she hopes to solicit. The asker then trains the prospect to "be" that person during the role play. This doesn't require a full biography or complete history with the organization—just a few pertinent notes.

   For example, the asker might say to the prospect, "For the role play, I want you to be my Aunt Rita. She always asks about my work and seems interested. She came to our open house last year but has never given. When I was at the theatre I saw her listed in the program as a $500 donor, and she is also active in her church, so I know she's a 'giver.' Let me tell you a little more about her ..."

8. Explain the debriefing model before beginning the role play, using the second flip chart page you prepared in advance. After each round, the trio debriefs the exercise as follows:

    - The asker goes first. He or she says two things about the meeting that went well (two compliments) and one suggestion for how to improve it. For example, "I was enthusiastic and I know the organization really well, but then I asked for the money and kept talking. I need to ask and have the discipline to be quiet."
    - The prospect goes next, following the same format: providing two compliments to the asker and one suggestion.
    - Finally, the observer offers comments, following the same format: two compliments and one suggestion for the asker.

9. Each round of this exercise—dividing up the roles, doing the role play, and debriefing—takes about 15 minutes. Then all participants rotate to a new role. As the facilitator, keep general track of the time (you don't need to ring a bell every 15 minutes), check in with the groups occasionally, and speed them up or slow them down as needed.

10. To debrief this exercise, reconvene the full group and ask some combination of the following questions:

    - What did you learn from this exercise?
    - When you were the asker, what's one thing you did well?
    - What do you need to improve on?
    - What do you want to remember from this exercise to use the next time you ask for a gift?

TRAINING TIP Many are visual learners, grasping concepts more effectively through pictures and symbols, which is why we asked you to create the triangle with the words Asker, Prospect, and Observer. This simple graphic, paired with the number of minutes for each portion of the exercise, makes it easier to understand how the exercise is supposed to work.

Sierra Club Iowa Chapter

Volume 2, Issue 1

September 3, 2010

2010 Fall Fundraising Campaign

Chapter Launches Second Annual Campaign

The Executive Committee launched its 2nd Annual Fall Fundraising Campaign on August 28. The campaign's goal for this year is to raise $37,500 by November 14.

Committee members present at the August meeting rehearsed their fundraising pleas with other ExCom members. Of the nine members present and a pledge from one that was absent, the group collectively raised $3,735.00.

Congratulations! That's awesome.

Annual Dinner Invitation

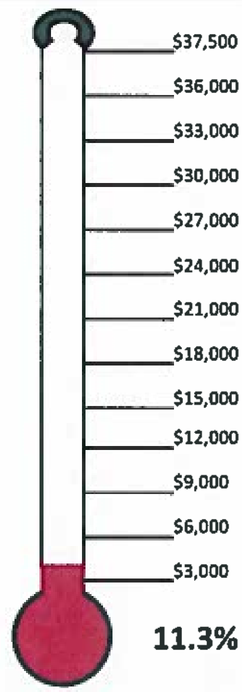
Donna recommended "inviting prospects to a small gathering of supporters and potential supporters so that they can learn firsthand the magic of your organization and the need for support now."

Our Annual Dinner is October 1. Reservations and payment are due to Jane by September 15. Although there is some wiggle room, we need to know how much food to order.

Your packets contain one promotional flyer for every prospect assigned to you. Try to make your contacts with donors so they can make a reservation by the September 15 deadline.

Questions

If you are asked questions about an issue and you don't know the answers, please write down the question, send it to me and I'll draft an answer for you. I will be on vacation beginning Friday, September 3, and will return on Monday, September 13. If a question arises before I return, either contact Pam or let your donor know it will be at least the week of September 13 before we can get back to them with an answer.



Campaign Goal	**$37,500**
Gifts & Pledges	**$4,785**
Yet to be Raised	**$32,715**

ExCom Member	Started	Completed
Buell		
Carsner		
Clark		
Murdock		
Engstrom		
Neff		
Neustadt		
Redmond		
Riggs		
Soelberg		
The Taylors		
Tigges		
Winterwood	X	
Whiting		

Remember the paperwork

In case you missed it at Saturday's meeting, it is CRITICAL that the donor and the solicitor sign and date the pledge form (yellow sheet) then send the form to me. I need the pledge form in order to record the pledge and/or check. The signed pledge forms are also important for us to acknowledge our donors early next year.

Tips:

If you make a pitch to someone and they say "contact me in a month," first let them know that they can pledge an amount and agree to pay later. If they still ask to be contacted later, put it on your calendar and REMEMBER to call them later. A simple phone call would be fine, offer to pick up their check and then fill out the pledge form when you pick up the check.

Sierra Club Iowa Chapter

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Explore, enjoy and protect the planet

THANK YOU

Thank you cards are included in your packet. Please remember to send a personal thank you card after you meet with your prospective donor. I will send an official thank you letter from the Chapter after I receive the pledge form and/or the check.

We're on the web! Iowa.sierraclub.org

We have web pages dedicated to many of the issues that are important to our members and supporters. Encourage your prospects to check out our website. If they have ideas on what they'd like to see on the web, be sure to have them include that on the back of their pledge forms.

Thanks, Charlie, for being the first solicitor to send a check from a donor! And, a special thanks for including the pledge form.

Win Prizes!

It was recommended last year that we include prizes for our volunteers who work very hard under rather uncomfortable conditions to raise money for the chapter. The abbreviated timing of the campaign caused us to forget about this important element. This year, the campaign will acknowledge solicitors as follows:

- First-time fundraiser
- First one to schedule all appointments (e-mail me or I won't know who's first)
- First one finished meeting donors
- First one to turn in the paperwork
- Person who brought in the most money
- Person who made the most contacts
- Person who conducted the most meetings
- Most unusual story
- Person suggesting the best changes for next year's program
- Best team effort
- Person who returned the highest percentage of $ amount assigned to them
- EVERYONE who includes 100% of their signed pledge sheets
- Person who helps above and beyond the call of duty with the post-campaign follow-up
- Person who complains the least (Jim Riggs' idea)
- A for Effort

We haven't figured out what the prizes will be yet so we'll all be "surprized."

"We improve ourselves by victories over ourself. "
Edward Gibbon, English historian of Rome (1737 - 1794)

Have a great week!

Cheering Them On!

How to Encourage Board Members to Make Their **MAJOR DONOR ASKS**

BY BEN GREGORY

EDITOR'S NOTE: Colorado Conservation Voters (CCV) launched their major donor campaign by training their board members in making the ask, then going into high-gear follow-up. Each week, development director Ben Gregory sent a chatty and cheering email to all the askers.

In order to keep board members motivated, reward those who were successfully completing their asks, and make their fundraising progress visible, they created "The CCV Ask Tree" and included it in every email, along with a "Tip of the Week" to reinforce good fundraising practices.

The tree, shown here, got filled in as asks were made and donations received. Each leaf represented a meeting request or ask letter from a board member. Meetings held were represented by fruit blooming on the tree, and donations received (the green stuff) piled up beneath the tree's branches, as in the second image on the next page.

The emails also reminded askers of some key incentives, such as special gifts and benefits that accrue to their major donors, the fact that people could become major donors by giving smaller amounts over time to add up to a major gift, and the terms of a challenge gift from an anonymous donor.

The weekly tips were a clever way of getting board members' attention and reinforcing the fundraising training they had received by reminding them of asking strategies. But their main effect was to keep people engaged in the process by passing on news about the campaign — each week updated progress toward meeting the challenge gift — and about recent organizational accomplishments. Because the work of board members in a campaign like this is very solitary — the calls and meetings are done individually, as opposed to as part of a group effort as with an event or phone bank — this weekly communication served to keep people feeling connected to the larger campaign, which in turn helped them stay on track with their tasks.

In addition, each email reinforced that help with their fundraising asks was only an email or phone call away. A brief section at the end of each email headlined "Let Me Help You" encouraged askers to contact the development staff for help with letters, donor packets, supplies, research, advice — "anything that will make your fundraising easier."

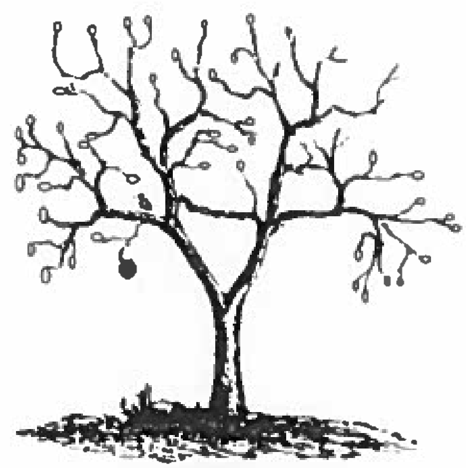
Gregory's enthusiasm and cheerleading had the desired effect: spurred on by the weekly reminders and encouragement, board members raised more than $13,000 in the three months they had allocated to the campaign.

Following are nine tips board members received over the course of the campaign.

TIP #1: HOW TO HANDLE THE PUT-OFF

When making your meeting request calls, many of your friends and colleagues will have completely valid reasons for not meeting now. The most important thing to remember is to listen to what they say and take it at face value. "I'm too busy right now" means they are too busy right now, not that they won't consider a contribution to CCV. Below are some suggestions for how to handle common responses:

- "I don't have time to talk right now." =
  "When would be a good time to call?"
- "I don't have time for a meeting, can't we do this over the phone?" =
  "The meeting will only last 20 minutes or so and I am happy to come to you. It really helps to meet face to face, but we can do this over the phone if we must."



CCV Ask Tree
BEFORE

21

- "I'm strapped for cash right now and can't donate $500."=
  "Your contribution is completely up to you. I'd still like to sit down with you and talk about CCV's work and find the appropriate contribution for you."
- "All my money is going to get Obama / McCain / Clinton / Snoopy elected." =
  "This is certainly a big year across the country. I'd still like to meet with you to discuss the incredible influence the Colorado legislature has over environmental policy. Maybe you know someone else who would be interested in investing or would like to support us after the elections."

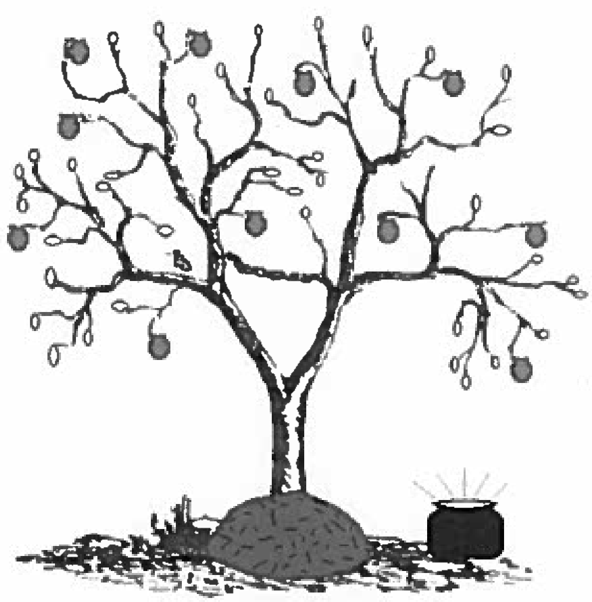
Remember — take what they say at face value and don't miss an opportunity to introduce someone to CCV, even if they might not be writing us a check today.

TIP #2: WHERE SHOULD YOU TRY TO MEET YOUR PROSPECTS?

The proper location for your donor meetings can make a big difference. Here's a list of some of the options and things to consider before you suggest a venue:

The prospect's home — Traditionally considered the best place to make an ask. It is very important that your prospect is at ease and there are few interruptions, making a home visit ideal. You also have the advantage of a more relaxed pace if you wish to linger awhile instead of making the ask in a rush.

The prospect's workplace — The second-best choice, meeting at a workplace, allows you to talk to the prospect on their "home turf." There will be a greater opportunity for interruptions than at their actual home, but it is still a great place for an ask meeting.



CCV Ask Tree
AFTER

Halfway up a fourteener or at your favorite fishing hole — Maybe a bit of an untraditional ask, but what better place to talk about what CCV does than in nature? You won't have the comforts of home, but reminding people why they love Colorado has a lot of value.

The CCV — This one is a mixed bag. The donor is going somewhere new, so they won't be as at ease as at home. On the plus side there are opportunities to see the organization and meet the staff. There are tons of opportunities to show off our campaign pieces and scorecards. If you'd like to meet at the offices, please let me know in advance so I can reserve a quiet spot for your ask.

The lunch meeting — Actually the worst place to make an ask. You will have to deal with constant distractions from your fellow diners, the lemon that your prospect asked not be added to his or her water but was anyway, and the pesky waiter interrupting right as you had started your pitch. And then there is the awkwardness that can come with the check. If possible, try to meet somewhere other than a restaurant or coffee shop.

TIP #3: THE VALUE OF PROPS

One of the advantages of meeting face to face with donors is that you have the opportunity to tell the CCV story with more than words. We have prepared major donor packets that include actual samples of our work — the Scorecard, the Governor's Report Card, campaign pieces, and an absentee ballot mailer. These can be very valuable to illustrate what we do. Also included are select pieces from the Storybank and a Board list to highlight our incredibly talented volunteers.

There is new growth on the tree. Jeff added a leaf through his first meeting letter and John added another fruit with his second successful ask. And there at the base of the tree is a pile of money! The money pile grows every time a Board member brings in a $1,000 or higher contribution. Way to go John! Let's fill this tree out for next week.

TIP #4: SILENCE IS GOLDEN

One of the hardest things to do when you've just made your ask is to give your prospect time to answer. Your donor will have a lot to think about and you should not fill that silence with words out of nervousness. Do whatever it takes to give your prospect a chance to respond — mentally count out 10 or 12 seconds, have a drink of water, whatever. Just give your prospect time to think about it before you speak. And remember it isn't a staring contest — you don't need to steel yourself by staring at the prospect while waiting for an answer. Relax and be natural.

TIP #5: THE PLEDGE FORM IS YOUR FRIEND

Your prospect just said he or she wants to contribute $10,000 and you gave him or her a hearty thank you — now is the time to hand over a pledge form. By getting your new donor to fill out a pledge form we will know when the gift should be made and when it is acceptable for us to follow up with the donor if it hasn't arrived. Two minutes spent going over this form can save weeks of delay down the road as you try to remember what was said and what was committed to at a then-distant meeting. I've attached the CCV Pledge Form to this e-mail for your convenience.

TIP #6: THE POWER OF $85

$85 isn't all that much money any more. It'll get you a couple of DVDs, maybe a season of the Sopranos, and some popcorn. Dinner for three and a couple of drinks at a mid-priced restaurant. Two tanks of gas. Things that a lot of people buy without really thinking about it too much. But $85 a month adds up to a contribution of more than $1,000 in a year. CCV is easily able to accept monthly contributions by credit card. Remember to give your prospects this option when you're making your asks.

This week, two new leaves sprouted from Gary's first asks and John added another fruit by introducing a new donor to CCV. Excellent work, fellas. If only seven new asks are made next week, I'll have to add another branch...let's make it happen!

TIP #7: BLOCK OFF YOUR TIME

We are all very busy people. Between our immensely successful careers, our wonderful friends and families, and our all-important hobbies, it can be tough to find the time to devote to being a volunteer fundraiser. Even professional fundraisers can find that their day fills up quickly before they've had a chance to make their calls. If this has been a problem for you, try scheduling CCV fundraising time into your calendar. Once or twice a week, set aside an hour to concentrate on getting your asks wrapped up, and then you won't have to think about it all the time. Just make sure that when that hour does come around that you stick to your schedule.

TIP #8: PARTY TIME!

Next week, CCV will kick off its 2008 Event lineup with a Birthday Party for longtime volunteer Faith Winter on Thursday. While all of your Board fundraising asks are for significantly more than the suggested donation for these events, you can still use these as an opportunity to introduce your prospects to CCV. Invite your prospects to join you at one of these events, explaining that you are asking them for a leadership gift of $XX and that this is a great opportunity to meet the executive director and the excellent staffers and volunteers who support CCV. You don't want to put pressure on your prospect in public, so it is important to make the ask before the event itself and use this as an informational opportunity.

TIP #9: TELL THEM YOUR STORY

Over the years, each of you has invested a considerable amount of time and your own money in CCV. Your reasons for supporting CCV personally are the most compelling cases that you can state for your prospects because they are closest to your heart. Tell them about why you moved to Colorado, why you care about the environment, or what convinced you to invest in environmental politics.

Another fruit popped up thanks to a gift from one of John's prospects. Good work, John! We still have time to fill the tree before the Board Meeting. Let's make it happen! GFJ

BEN GREGORY IS DEVELOPMENT DIRECTOR FOR COLORADO CONSERVATION VOTERS.