

The Campaign for



Capital Campaign Volunteer Manual

Prepared by Demont Associates

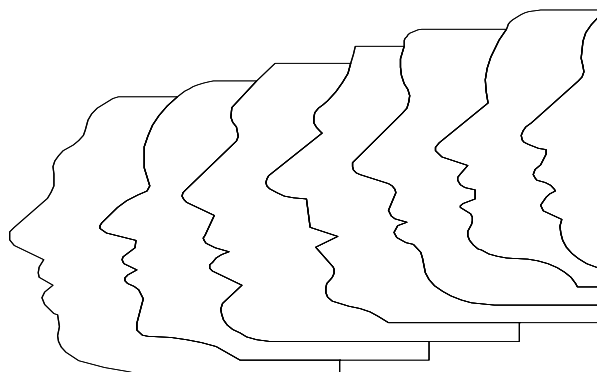
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Seven Faces of Philanthropy (Prince)



Motivations/Types of Philanthropists

	Face of Philanthropy	Motivation
Pleasure:	<ul style="list-style-type: none"> • Altruist • Socialite 	<ul style="list-style-type: none"> • Doing Good <i>Feels Right</i> • Doing Good <i>is Fun</i>
Consequences:	<ul style="list-style-type: none"> • Communitarian • Investor 	<ul style="list-style-type: none"> • Doing Good <i>Makes Sense</i> • Doing Good <i>is Good Business</i>
Duty:	<ul style="list-style-type: none"> • Dynast • Devout • Repayer 	<ul style="list-style-type: none"> • Doing Good is a <i>Family Tradition</i> • Doing Good is <i>God's Will</i> • Doing Good in <i>Return</i>

For more visit: https://www.ntc.blm.gov/krc/uploads/412/39_MbN_seven-faces-philanthropy.pdf

People Give to People: Simple Rules for Successful Fundraising

Given to volunteer leaders at Keewaydin as a companion piece to this Volunteer Training Manual, *People Give to People* underscores the single most important lesson of fundraising, which is that success results from solicitors' ability to connect and sustain personal relationships with donors. The following lessons are explored in greater detail in the pages of the book.

1. Never Be Embarrassed to Ask People for Money
2. If You Don't Ask, You Won't Get Your Turkey – Build Your Motivation to Ask
3. Call Your Mother – Start with Your Best Prospects First
4. No Cow Ever Let Her Milk Down with a Call or a Letter – Real Dollars are Raised Face-to-Face
5. The Hunt for the Charismatic Mega-Fauna – Remember the 90/10 Rule
6. You Don't Make a Pickle by Squirting Vinegar on a Cucumber, You Gotta Let It Soak – Plan One Contact for Each Digit of an Ask
7. I Am Sorry, We Have Sold All Our Burrows – Keep the Conversation Going!
8. Don't Embarrass Me – Put the Fun in Fundraising
9. It's Not Evidence, Your Honor, It's Art! – Know How and When to Use Humor
10. Once There Was a Bad Person Who Went to Hell... - Really Understand Your Donor
11. It's That First Picture That Got Me – Leverage an Emotional Response from Your Donors
12. To Land a Wary Trout, You Have to Present the Fly Carefully – Tailor your Approach for Each Prospect
13. If You Want Money, Ask for Advice, If You Want Advice Ask for Money – Listen the Gift
14. You Don't Need to Thank Me – No Matter What, Express Gratitude
15. Birds of a Feather Flock Together – Match the Solicitor's Gift Level with the Donor
16. It's Not Just the What, It's the Why – Convey a Bold Vision That Inspires Others to Give

Top Ten Reasons Major Gift Prospects Say “No” to Requests

Principal reasons given by major prospects who did not respond positively to a request for support:

1. Mismatch of Interests
2. Premature Request
3. Failure to Ask for Specific Amount
4. Failure to Ask for Enough
5. Asked for Far Too Much
6. Failure to Convey Urgency
7. Wrong Solicitor
8. Did Not Include Spouse/Partner
9. Poor Timing
10. Bad Luck

Ten Things Effective Volunteers Must Know Well Before Soliciting Others

1. Three Major Talking Points: The Case/Opportunity/Urgency.
2. Gifts sought for the campaign are over and above annual gifts.
3. THE most important factor in your success is your own gift.
4. Few volunteers can successfully solicit a larger gift than their own.
5. Face-to-face asks are required for thoughtful and proportionate campaign gifts.
6. Your rapport with and ability to persuade your prospect is both a gift and a responsibility to steward for a greater good.
7. People invest in causes that reflect their own personal values.
8. You must get to know your prospect well to know number 7 and ask effectively.
9. 80% of the assigned “ask” should be listening; only 20% is talking.
10. Rushing the ask rarely leads to optimum outcomes. Good things take time.

Solicitation Guidelines

The current comprehensive campaign is one of the most important projects Keewaydin Foundation has ever embarked upon. Informed fundraisers know that people give to people, more than to causes or institutions. Therefore, your effectiveness as a solicitor is crucial to the ultimate success of this campaign. Your dedication and commitment to Keewaydin and willingness to support the Campaign will help your successes. Demont Associates will also provide ample training to support your role as a leader and successful volunteer solicitor on behalf of this campaign.

As a volunteer solicitor, your job is to ask for and to secure campaign pledges from your assigned prospects. This job has four important segments:

1. **Inform the prospect**—know the campaign story and share with the prospect WHY this campaign is important to you and to the future of Keewaydin.
2. **Engage the prospect**—sincerely listen to your prospect and establish an atmosphere of shared concern and constructive communication.
3. **Raise their sights**—educate the prospect about campaign policies and giving vehicles that can influence their gift including: the number of gifts necessary for success, gift recognition opportunities, tax benefits, ways of giving, the multi-year pledge period.
4. **Ask for a thoughtful and appropriate commitment**—the process of Prospect Review and Evaluation will help determine a gift level that is meaningful to your prospect.

The following guidelines will help you prepare for these tasks and make the most effective use of your time and energy:

Know the Story and Convey the Message

The key word is convey. Simply knowing the facts of the Case for Support is not enough; you must also be able to convey that information to your prospect efficiently in the fewest possible words while also conveying your personal commitment to the campaign. Much of what you say and what is heard in these situations depends greatly on the perceptions and expectations of the individuals involved.

Do not assume that your prospect knows and understands the Case for Support. Do not assume that your prospect understands the importance of the campaign. Tell your prospect about the strong points in the Case and tell them which ones most impressed you and motivated you to give.

Engage the Prospect

You have engaged a prospect when you have established a comfortable rapport and have raised the prospect's interest, enthusiasm, and confidence in Keewaydin's mission. The key words are "listen" and "communicate." Establish a dialogue as soon as you meet with the prospect. Talk about Keewaydin and your shared experiences — relax, be yourself and share

your enthusiasm and confidence. Control the dialogue and its direction by asking questions to get a sense of what your prospect is thinking.

- *"What brought you to that conclusion?"*
- *"Could you explain that further in order to help me understand your position?"*
- *"Do you mind if I ask you what made you feel this way?"*

You need to establish your prospect's present outlook and attitude about Keewaydin in order to decide how to proceed. Remember, their perception is their reality. If your prospect's attitude or outlook requires adjustment, do not argue with the prospect. Being defensive only solidifies their position and polarizes the conversation. Acknowledge their perception, either personally or generally, and give them an alternative.

- *"I see what you're saying, and to be honest, I felt that way myself until..."*
- *"I wasn't sure we were going to be able to get those large commitments either, but to date we already have two six-figure gifts and four five-figure gifts. I am now very confident that the dollars are available."*

The process is technically called **active listening** and works remarkably well.

- *"A lot of people felt the same way, but after we discussed these issues with campaign leadership, we understand the concept better..."*

Always maintain a positive and optimistic outlook. Remember you are doing good work for a very deserving organization that has provided you and the prospect with lifelong memories and affection.

Raise Their Sights

Many of our prospects are not initially thinking of a gift at the level that you will ask them to consider. To raise the level of their thinking consider the following:

- Discuss how you handled the same situation; how after thinking about the importance of the campaign, you personally stretched to make a gift that you are proud of.
- Talk about the Gift Chart for Success and the level of gifts necessary for success.
- Let your prospect know of gift recognition opportunities, pledge period and the tax advantages of giving.
- Others are out in front as well; share with your prospect some of our other lead gifts and let them know that others are being asked and are giving at the same level.
- Discuss the value of leadership gifts to the campaign and how their leadership can be an example for others.
- Share the results of the Advance Gifts campaign as an example of dedication, commitment, and generous giving by those closest to Keewaydin.

- Consider as a fallback the extension of pledge payments over seven years for larger gifts.

Thoughtful and Proportionate Giving

Although decisions regarding the magnitude of the investment rest with the prospect alone (no one will be told what they should give), we hope you will ask each prospective donor to consider a thoughtful and proportionate pledge. Their gift should be based on their ability to give, their understanding of Keewaydin's vision role, and their interest in the projects to be funded by this campaign.

To secure gifts at this level, however, you as the volunteer and representative of the campaign must ask for them. You must also believe in the evaluated figure. This "considered amount" is an estimate of what prospects could contribute if they were sufficiently motivated. It is only a measure of potential -- not a price tag or what they should give.

- *"We hope that you will consider a gift in the range of \$____ over a period of 5 years."*
- *"We hope you are in a position to consider a gift in range of \$____ a year for each of the next 5 years."*
- *"I hope you will join me as one of the \$____ gifts this campaign will require."*

Other Points to Consider

Plan on Two Visits

You must convey the attitude that nothing is more important to you than coming back to see your prospect after he/she has had the opportunity to consider your request.

- *"My commitment is to come back and see you. You are important enough to me and to the campaign for me to take the time to meet with you again."*
- *"I promised to give my best effort for Keewaydin, and I would be doing less than that if I did not come back to see you."*
- *"Please seriously consider what we have talked about, but do not make your decision until I can talk with you again."*

What if your Prospect's Considered Pledge is Far Below Evaluation?

- a. *Negotiate* - you do not have to accept the first offer. Just because a person indicates the possibility the gift may be lower than you need, don't feel that you have to hear this

as the final word. Think of it as part of a conversation in progress with no doors shut to further consideration. Many people think aloud as they process something – and what they first say should not be considered the final word. Continue to explore reasons strong support is needed and ways they might be able to do more than they think possible at first. Pursue the advantages of pledges and gifts of appreciated securities:

- *“Thank you for considering your pledge, but I’d like you to think further about what a pledge of \$_____ would mean to the campaign. We need gifts in that range to ensure success.”*
 - *“If you are not in a position to consider a gift at the \$_____ level given your degree of interest and your ability, who else might be asked for such an investment?”*
- b. Do not request the pledge card be sent to the prospect until you feel the gift is adequate and you believe you have done all you can to gain their optimum support.
 - c. Tell them that you would like [campaign leadership] or another campaign volunteer to visit with them to discuss the campaign further.
 - d. Our wish is to not ever offend the donor. In some cases, we may have to accept a lower gift than we had hoped for while asking if we can keep the door open to come back at a later time to talk about it again.
 - e. If the donor's sights simply cannot be raised by our volunteers, then we will heartily thank them for their gift and make them a cultivation project for future projects.

Consider Every Visit a Positive Opportunity

Avoid the temptation to consider visits which result in lower gifts than hoped for as failures. Instead view every visit as an opportunity to tell the story. Recognize that the more the story is shared, the more the base of support will grow. Although the particular prospect may be unable or unwilling to support this campaign, if you have made a favorable impression – they will tell others about the campaign in a positive way. In time, they too may surprise you by lending their support to the organization.

Remember that once people become supporters, the door is open for a good organization to work with them to deepen their commitment and support.

Important Tips

- a. Stay away from the pledge card. Only request the pledge card be sent to the prospect when negotiations are finished.
- b. Solicitors should be peers who have stretched to make their own proportionate gift before asking others.

- c. Volunteers should call in teams unless there is a special relationship with one certain volunteer. The campaign office can arrange team support.
- d. Large gifts need time to soak in — don't rush the ask.
- e. Work within the scheduled deadlines. Campaigning is a much more enjoyable and gratifying experience if it is successfully completed within a short, intensive timetable. The longer you delay, the more difficult the task will become. Work through the campaign office to set personal deadlines that are compatible with your own calendar, and complete each of your assignments in the allotted time.
- f. See your best prospects first. Start with the prospect you believe will respond most favorably.
- g. See your prospects in person. Phone personally to set the date and time for your visit. Your personal visit to explain the campaign will emphasize the importance of the effort and will underline the importance it has for you and, you hope, for your prospect.
- h. Ask for a thoughtful and proportionate pledge. To secure the gifts necessary for success, you must ask for them. You must also believe in the amount of the gift you are asking your prospects to consider. **After you have asked your prospect for a specific amount, be silent. Let him or her have the next word. Let your "ask" soak in.** This last pointer bears repeating, as it represents one of the most powerful solicitation tools you have: **After you have asked your prospect for a specific amount, be silent. Force yourself to let him or her be the next one to speak.** In most cases, you are likely to have asked the prospect to consider a gift considerably higher than he or she may have expected. Your silence underscores the importance of your request and allows it time to settle in. Jumping in with "Of course, anything you can do for the campaign will be fine!" undermines your "ask" and devalues all your preparation -- to say nothing of selling Keewaydin's cause short.
- i. Retain control of the pledge card. If you leave the pledge card, you break an extremely important line of contact between you and your prospect. The pledge card should go to your prospect ONLY FOR HIS OR HER SIGNATURE. Set the appointment that will permit you to come back to see your prospect when he or she has made a decision. Then, and only then, should you produce the pledge card.

A 10-Step Approach to Success

1. **Make your own gift or pledge first.** Making your own campaign contribution is your most persuasive act. Once you've given, you can say to any prospect, "I'm not asking you to do something that I haven't already done," or "I gave to Keewaydin because..." When you put your own money behind the cause, you double your fund-raising leverage. **Making your own pledge first is a must.**
2. **Do your homework.** Before you meet with a prospect, educate yourself on any new developments at Keewaydin, membership numbers, the Campaign's needs, progress to date, and various gift recognition opportunities. Make sure you've found answers to any of your own questions or concerns. Once you have convinced yourself, you will find it much easier to convince others.
3. **Learn about your prospects.** Campaign Staff will provide you with general information about each prospect's past giving record, and a sense of his or her area of interest in Keewaydin.
4. **Phone or write the prospect in advance.** You will know some of your prospects well, and you can make appointments with them in whatever way feels most comfortable. Even with a close friend, however, it's worth arranging a formal meeting at a location amenable to a confidential discussion. Other prospects you may know only casually, and some perhaps not at all. You may wish to write a note in advance, explaining that you will call to set up a meeting. When asking for an appointment, be candid about the purpose of your call. Say that you want to talk about the campaign and their participation in it. When you make that follow-up call, **don't be led into a gift discussion over the phone.** Explain to the prospect that the importance of the discussion calls for a personal interview. Suggest a quiet, private place to meet. Schedule the appointment for within one week of your phone call to minimize cancellations and confirm the visit within 24 hours of the actual appointment.
5. **Meet face-to-face and use the first meeting to inform or further engage the prospect beyond previous contacts made by others.** Each solicitation will probably take at least two meetings. Gifts the size you are seeking require the prospects' time and thought. At the start of the first visit, learn about your prospect – get him/her to talk about philanthropic interests, about his/her commitments, and about the organization and project. **Patience and listening are a fund-raiser's greatest virtues.** Visiting a prospect more than once can lead to results exceeding your expectations.
6. **Use additional meetings to develop a clear focus.** In subsequent meetings, lead the prospect toward a specific campaign commitment. Feel free to ask another campaign volunteer to join you in presenting the case in one of these follow-up meetings.

7. **Ask for a specific gift.** Once you have made your case and answered all the prospect's questions, don't prolong the process. It is time to make "the ask." Even if you find it hard to get the words out, you must suggest a specific figure. When it comes time to ask for a gift, do so simply, directly, and for a specific amount. Using the asking figure, take a deep breath and say something like, "We hope you will consider joining me in making a gift in the range of \$XX,000 for Keewaydin over five years."

Now comes the hardest part -- allowing several moments of silence for the prospect to respond. Your request will most likely be higher than what the prospect had in mind, so do not expect an immediate "yes." After you have stated the figure, resist the natural temptation to continue the conversation's flow. Just be calm and leave the ball in the prospect's court. There will be ample opportunity to answer any concerns or questions once he or she has responded. ***It may help you in these moments to remember what all seasoned fund-raisers know: prospects are rarely affronted and often flattered when asked for an unexpectedly high amount.***

If the prospect's response is "that's too high," you might place your request in perspective. Using the Gift Chart for Success to show the prospect where the gift lies on that table, you can visibly demonstrate the importance of his or her contribution. You can also show that others are being asked for similar and larger amounts over and above what they have given in the past.

You may come across a prospect who is instantly prepared to make a Campaign commitment not at the level you request. If you cannot persuade the donor to think about a "stretch" gift, and it is clearly now or never, accept the check. When you do so, however, emphasize the magnitude of the Campaign and your hope that he or she might be willing to make an additional commitment later.

Make every possible effort to avoid a "token" gift or a flat refusal. If you sense an outright rebuff, try to defer the decision. Tell the prospect you will call again in a couple of weeks. When you do call, have something additional to report -- progress toward the Campaign or additional thoughts on a topic that came up in the previous meeting.

Finally, remember that even the most promising solicitation sometimes results in a disappointing gift or a turn down. Take it in stride. Your efforts may lay the groundwork for a future gift or provide valuable information for different approaches.

8. **Close.** The prospect may ask for time to think over your proposition or may tell you then and there what he or she will give. In either case, you should be familiar with certain mechanisms that will enable the donor to pass the gift most easily to Keewaydin. You can, for example, suggest that the donor make the gift in installments over five years. You can also remind the donor of potential tax advantages in making a gift of appreciated securities instead of cash. Refer to section on the "Tax Advantages to Giving" on page 16 for the advantages of giving appreciated securities.

Occasionally, a prospect may ask that the gift be anonymous. Assure him or her that the campaign will honor that request and ask them to check the anonymous box on the pledge card.

Before you leave, make your follow-up appointment. Tell your prospect you want to get together again soon. (“How is next week at this same time for you?”) If you leave without setting up the second appointment, you may well have to struggle through a series of phone calls before determining a convenient follow-up time. In the meantime, the delay has eroded your momentum and your management of the solicitation – and probably the size of the potential gift, too.

9. **Get the commitment in writing.** Once the donor has made a Campaign pledge, get it in writing by reporting it to [campaign/Keewaydin administrator] and the Demont team who will see that a pledge card is provided to the donor on a timely basis. This will ensure that the campaign staff can properly and promptly acknowledge the gift.
10. **Follow up.** If the solicitation is successful, you will want to send your own personal note of thanks. Even if the gift was smaller than expected a hearty thank-you is not only an important courtesy, but it also sets the stage for a further commitment. All pledges and their terms will be acknowledged by the Campaign staff and Campaign Chair.

THREE POINTS TO REMEMBER

1. Tell the story of the importance of the project.
2. Ask for a specific pledge amount.
3. Explain how the gift will be recognized.

Anticipating Tough Questions

Some of your prospect's initial reluctance to make a gift may be expressed in questions or concerns. Below are several of the toughest questions and suggestions for answering them.

1. ***“What is the deadline for the dollar-for-dollar Board Match?”***

All Board gifts/pledges must be made by October 31, 2023 to be considered for the match.

- a. ***“Is the \$1.5M matching gift from a Board member and included in the \$3M Board Division Goal?”*** YES. But the donor wishes to remain anonymous and shared only at his/her discretion.

2. ***“What do you mean by a Leadership Gift?”***

A Leadership Gift is a gift of \$50,000 or more (inclusive of annual giving) over the pledge period (through January 2028).

3. ***“Everybody is asking me to give. We already give to so many organizations.”***

We all appreciate this. Your task, however, is to help prospects see that Keewaydin has an important place in their priorities. Explain the thinking process you went through in deciding on your own gift.

*“I know that feeling. **(Empathize)** I've decided to re-evaluate those causes every year to determine the ones with most need or deserve my support most. I've thought a lot about this campaign and have decided that right now this is the place that needs my support. Consequently, I may cut back on some areas temporarily. I am making a stretch gift over the next five tax years. I certainly respect that this may not be your only philanthropic priority. What are the ones you feel are important?” **(Probe)***

4. ***“I don't like the way things are going at Keewaydin.”***

The prospect may not be well informed or up to date. Hear him or her out and repeat what you have heard. **(Summarize/restate)** It is not necessarily your task to defend a specific policy or action. You may report the objection to a Campaign or Division Chair, who can supply a response that might be helpful. If your prospect continues to be adamant, leave the materials and try to see the individual again. As you know from experience, some people like to vent their emotions before getting down to the business of considering a case on its real merits.

*“Thanks for sharing that. **(Affirm)** I know Keewaydin leaders want to have feedback because they are dedicated to the future of Keewaydin and our strategic priorities. I will see that this information is shared with them. Or perhaps you would like me to arrange for the campaign chair to visit with you?” **(Probe)***

5. “Frankly, I don’t have the income to make a gift of the size you mentioned.”

“Certainly, you are not alone in seeing your income and wondering how you could possibly make a gift of this magnitude. **(Summarize)** It is a lot of money. **(Affirm)** Have you thought about giving from capital rather than current income? **(Probe)** Options include stretching payments over the five-year pledge period or giving appreciated securities, which may have substantial tax benefits. Would these options be of interest to you?” **(Probe)**

6. “Why are you talking to me now?”

“Because you have been a strong supporter of Keewaydin! **(Affirm)** This campaign calls for unprecedented levels of giving if the campaign is to achieve their goal. Past experience suggests that a high proportion of the total effort must come from a small number of major gifts from our top donors. While it is important to build a broad base of donor support, it is absolutely critical to secure those lead gifts whose cumulative impact will determine the success or failure of the Campaign.”

(Probe) Is this a good time to ask you for your commitment or is there a better one? Is it a matter of cash flow in the immediate timeframe?

7. “Who said I could give this much?”

“I hope you are not offended by this ask? **(Probe)** When I was asked for a big number, it provoked me to think similarly. **(Empathize)** The ‘think about’ figure was derived by the collective assessment of volunteers after considering the size of gifts needed for success and your perceived interest and ability. The intent is not to tell you or any prospect what to give, but it does attempt to relate the potential gift to the overall goal. We are asking for consideration of multi-year pledges commensurate with donor’s interest in our campaign and their ability to give. The giving so far in the campaign has validated the ‘think-about’ figures. As you can see on the chart, we need X gifts at this level – and our hope is that you will consider being one of those. How do you feel about committing to a gift of X over five tax years? **(Probe)**

8. “I can’t afford to give now. Maybe later.”

“I am grateful that you want to support the campaign. **(Affirm)** But I also hear that you would like to give on a later time frame? **(Summarize/restate)** Perhaps starting the pledge later in the year or in the next year would work for you. Or maybe you want to consider a gift of appreciated stock, if that would be more tax advantageous for you. Can you think of any other creative ways we can work with you to gain support on the campaign? **(Probe)**

9. “My financial situation is up in the air right now. I am wary of making a commitment.”

*“I appreciate that especially in light of what you have told me **(Affirm)**. If this is not a good time for you, we can certainly respect and revisit your support at a later date. I hope that changes for you soon, and knowing you I am sure it will. **(Sympathize)** May I call you in X months to revisit this?”*

*Given your specific situation, a flexible pledge period may be more convenient for you. If your circumstances do not change, what number would you feel comfortable committing? **(Probe)** If things go as you hope they will, is there a number you would like to reach? **(Probe)** Given your situation and your strong desire to support this effort, you might want to consider a pledge with which you are comfortable now, with the possibility of increasing it late.” Does that make sense for you?”*

10. “How will my campaign gift be used?”

“Unless otherwise designated by you, all gifts to the Campaign will be allocated to the needs outlined in the Case as approved by the Campaign Cabinet.”

11. “What did you or others give?”

*“We have received several Leadership Gifts of \$XX,XXX or more and in the range of what I am asking you to consider, including my own.” **(Show Gifts for Success Chart)** Also feel free to share the progress of the Advance Gifts or Leadership Gifts division toward their own goals, and how this person’s gift would help advance that progress.*

12. “I am unable to meet with you for an appointment.”

*“It sounds as though you are very busy these days. **(Restate)** I hear you. **(Affirm)** I certainly can relate to that. **(Empathize)** However this project is important to me and I believe to all of us who support Keewaydin. I am willing to meet you wherever it is convenient. Can you give me 30 minutes of your undivided attention at a later date when you are not so pressed for time?”*

13. “I have already decided. No need to come visit. Just send me some information and the pledge card.”

*“Well thank you for this positive response. **(Affirm)** I would still like a chance to meet with you. First, I would welcome hearing more about your interest and what I might learn in approaching others for support. Second, part of our work is to help those who understand what is at stake and to equip our thoughtful supporters like you to be informed advocates for the campaign. You know so many key people and I’d like some time to review the whole project. We need all the financial and vocal support we can get*

and it's certainly worth my time to visit you personally. I have some other business in your area next week. Is it simply a matter of your time?" **(Probe)**

14. No need for you both to come. How about you and I have lunch?

"Oh, that is very thoughtful of you. **(Affirm)** I would like to do that some time. However, I would appreciate it if I could bring [other solicitor] to see you in your office or someplace convenient to you. He/she can share with you more information about the campaign than I can. How would you feel about a rain check on lunch so we do not take too much of your time on this visit and are more assured of a private conversation?"

15. I will get back to you after I decide. Better yet, leave the card and I'll send it in."

"Actually, I don't have the card with me. My purpose for this visit has been to explore options and arrive at some understanding of the campaign progress and remaining areas where we need help. To be honest, it's important enough and easier for me to finish my volunteer assignment if we set another time to finalize your commitment and make sure we get all the information we need. This way we are both sure the pledge gets to the office in a timely fashion and we are clear on your intentions."

16. After our first meeting, we have decided. Send the pledge card. We are ready to commit.

"That is great. **(Affirm)** I am excited that you have decided to support the campaign. **(Probe)** How about lunch on me to celebrate?"

You are important enough to me and to the campaign for me to take the time to meet with you again if only to make sure you are up to date on the campaign. I promised to give my best effort for the campaign, and I would be doing less than that if I did not come back to see you."

17. I just came on the Board. Is that why you wanted me...for money?

"In part, yes, because that is one important aspect of every Board member's role. But our reasons for asking you to serve on the Board go far beyond your capacity to give financial support. We hope you will give us your time and talent as well as your treasure within your means." **(Affirm)**

18. I would give more, but I disagree with the long-range plan.

Same as answer #2: The prospect may not be well informed or up to date. Hear him or her out and repeat what you have heard. **(Summarize/restate)** It is not necessarily your task to defend a specific policy or action. You may report the objection to a Campaign or Division Chair, who can supply a response that might be helpful. If your prospect continues to be adamant, leave the materials and try to see the individual again. As you

know from experience, some people like to vent their emotions before getting down to the business of considering a case on its real merits.

*"Thanks for sharing that. **(Affirm)** I know the leaders of Keewaydin want to have feedback because they are dedicated to the future of Keewaydin and our strategic priorities for the next generation of campers. I will see that this information is shared with them. Or perhaps you would like me to arrange for the campaign chair to visit with you?" **(Probe)***

19. What is the dollar goal for the Board? I am sure you do not expect the Board to give as much as other Boards.

"The goals for the Board were to achieve 100% participation and to lead the campaign with pace-setting support that inspires the community. The community will look to see how well the Board is supporting this project, and the Board will set the bar for the success of this fund-raising effort. That success will hinge on the perceived "stretch" that the Board has made. The Board's personal giving combined with our Campaign Cabinet is now over \$XXX,XXX.

20. My spouse will kill me if I give that much.

Whenever possible, try to meet with both spouses to avoid hearing this.

*"We don't want that! **(Affirm)** Perhaps we should schedule a meeting your spouse can also attend, so we can share with him/her the merits of this project and our needs."*

21. I cannot give this year.

*"That is understandable given what you have shared with me. **(Acknowledge)** You are not the only person in this position. Others have started pledge payments next year. I wonder if that would accommodate your desire to give? **(Probe)** Or maybe you want to consider a gift of appreciated securities, if that would be more tax advantageous for you. We are open to looking at creative ways to help you support the campaign. Talk to us about what would work for you." **(Probe)***

22. I do not pledge. I will do \$10,000 now and maybe more later if the economy stays strong.

*"\$10,000 is a very nice start! **(Affirm)** Have you considered signing a letter of intent to that effect? A letter of intent would allow us to credit you the full amount of your intended gift to the campaign."*

23. I don't need my name on a plaque.

“A meaningful way to contribute is to make a gift in memory or in honor of families or individuals. Here are some Gift Recognition Opportunities you may want to consider. I did the X in honor of my _____.”

24. We are over committed now with X, Y, and Z.

*Same as answer #19. “That is understandable given what you have shared with me. **(Acknowledge)** You are not the only person in this position. Others have started pledge payments next year. I wonder if that would accommodate your desire to give? **(Probe)** Or maybe you want to consider a gift of appreciated securities, if that would be more tax advantageous for you. We are open to looking at creative ways to help you support the campaign. Talk to us about what would work for you.” **(Probe)***

25. We are on a fixed income and cannot do much.

*Same as answer #19: “That is understandable given what you have shared with me. **(Acknowledge)** You are not the only person in this position. Others have started pledge payments next year. I wonder if that would accommodate your desire to give? **(Probe)** Or maybe you want to consider a gift of appreciated securities, if that would be more tax advantageous for you. We are open to looking at creative ways to help you support the campaign. Talk to us about what would work for you.” **(Probe)***

26. I would like to restrict my gift to the “such-and-such” project.

*“Designating your gift to a certain aspect of this project is acceptable. We would be happy to explore some very specific areas that have great needs. Do you have an area in mind? **(Probe)** You may also leave your gift undesignated, giving the organization more flexibility.”*

27. If everyone gave \$1,000 (like us), we would do pretty well.

“We will need gifts of all sizes to be successful. Averages do not work in fund raising because everyone’s circumstances are different.”

28. We cannot give the \$50,000 you asked us for. We are going to do \$10,000 a year for three years.

*“The terms of your gift can be convenient for you. Are you saying that \$30,000 is all you can do now? **(Probe)** Perhaps you could make a gift with which you are comfortable now, with the possibility of increasing it later?”*

29. We are short on cash.

Same as answer #19: *“That is understandable given what you have shared with me. **(Acknowledge)** You are not the only person in this position. Others have started pledge payments next year. I wonder if that would accommodate your desire to give? **(Probe)** Or maybe you want to consider a gift of appreciated securities, if that would be more tax advantageous for you. We are open to looking at creative ways to help you support the campaign. Talk to us about what would work for you.” **(Probe)***

30. Harry (deceased husband) would have been interested, but it is not a priority for me.

“A meaningful way to contribute is to make a gift in memory or in honor of families or individuals. Here are some Gift Recognition Opportunities you may want to consider as a way of paying tribute to Harry’s long-standing commitment to Keewaydin. I did the X in honor of my _____.”

Asking Matters: Knowing Your Asking Style

Source: Asking Matters Website www.askingmatters.com



There are many effective ways to ask for gifts.

Some people take great care preparing well-organized and complete presentations. Others prepare with just a few talking points and then use the energy of the prospect to guide the conversation. Some people are energized by the prospect of tying down a gift. For others it is a great act of courage.

But for each of us, the asking process is made easier if we understand the style that suits us best.

The four *Asking Styles* outlined below are based on an analysis of the way people make decisions and the way they interact with others. The illustration above shows Extroversion/Introversion on the vertical axis and Analytic/Intuitive on the horizontal axis. Combining these characteristics leads to four primary *Asking Styles*, each of which can be effective in soliciting gifts.

Visit www.askingmatters.com and take the “Find Your Asking Style” survey to learn your Asking Style. Then use in the information on the next several pages to help you understand how to prepare and ask your prospects.

Rainmakers (Analytic, Extrovert)

- Decide objectively
- Are comfortable talking to anyone
- Need a wealth of information
- Connect by incorporating the style of the donor

Go-Getters (Intuitive, Extrovert)

- Decide based on instinct
- Thrive on being with other people
- Bring passion to the cause
- Connect through high energy and magnetism

Kindred Spirits (Intuitive, Introvert)

- Decide based on instinct
- Are private and quietly thoughtful
- Bring passion to the cause
- Connect through their deep commitment

Mission Controllers (Analytic, Introvert)

- Decide objectively
- Are private and quietly thoughtful
- Need a wealth of information
- Connect by laying out a thorough presentation

Asking Style: Rainmaker

You are an **analytic extrovert**. The information you gather and analyze informs your decisions and you are energized by your interactions with others and enjoy being sociable.

While asking for money might not excite you, the prospect of succeeding in a field so full of resistance may appeal to you. In fact, you enjoy the engagement and see it as a rich, vibrant, and important game. Your success will not only bring you some recognition, but will also help your organization. A win-win ... and you do like winning!

- You like people and get energy from your interactions with them.
 - You enjoy the feeling of being rigorously prepared and well-organized, knowing the facts and figures that will support what you are setting out to accomplish.
 - You have the patience to review material and analyze it.
 - You like the sense of competition and you want regular reports on how other members of the solicitation team are doing.
 - You want to know exactly what's expected of you, when you are to deliver your results, and who is going to follow up.
 - You like the camaraderie of a team and are both a strong competitor and a good team member.
 - You want the strength of excellent, well-organized supporting material.
-

Keys to Fundraising for a Rainmaker

- A solicitation package and signed proposal that is clearly organized and full of specific information, including what the money you raise will accomplish. (Impact of Giving)
- Clear description of what you are to do, including specific donor information, timetables, and follow-up instructions.
- Activity goals and financial goals. (Gift Chart for Success)
- Meetings of the solicitation team to get instructions, to report back, and to celebrate success. (Solicitor Briefing Memo)

Because you have a competitive spirit, you may want to challenge people you ask by being willing to raise your own gift in response to theirs.

Asking Style: Go-Getters

You are an **intuitive extrovert**. Your intuition results in the ability to think quickly and fluidly, which enables you to relate well to donors. As an extrovert you have a natural enthusiasm and energy that draws people to you. When you solicit a gift, you are able to connect the prospect to the cause with your vibrancy and personal commitment. You have little tolerance for systems and tracking information.

- You enjoy talking to people.
- You are comfortable being the center of attention.
- You are passionate and your passion is contagious.
- You thrive on high-energy experiences and anxiety doesn't stop you from action.
- If you really believe in what you are selling, your zeal will often win the day.
- You think quickly and are comfortable acting without detailed preparation.
- You can be very effective in the moment without a script.
- You love the high that comes with success.
- You aren't particularly patient with systems, like researching prospects and prioritizing them, filling in forms or tracking the information.
- You sometimes act impulsively.

Keys to Fundraising for a Go-Getter

- Your fundraising success will come from your passion for the cause.
- Before you solicit gifts, get some stories that move you about the people who will be served by your organization.
- You will do well soliciting people you already know. Don't shy away from asking your relatives, friends, and colleagues.
- You sometimes jump in and volunteer to do things you don't really have time to do. Be sure you take the prospect assignments you will be able to complete.
- E-mail or text your Campaign Director about your progress frequently and ask to be provided with reports on your progress.

Asking Style: Mission Controllers

You are an **analytic introvert**. Your ability to observe and listen makes you an effective solicitor. You place value on observing, gathering and analyzing information. You often make decisions based on a patient review of the information you have gathered. Your quiet ways give the people you solicit the space to tell you about themselves and by doing so to talk themselves into giving generously.

- You prefer to quietly get the job done by following a clean, clear step-by-step process.
- You value accuracy.
- You are curious and observant and often notice details that others might overlook.
- You feel most comfortable when you have spent the time going through each detail of the case and the solicitation process.
- You have a quiet demeanor and you take pride in having more substance and knowledge than people give you credit for.
- Your listening skills are well developed and you are comfortable in the listening mode.
- You have no need to be celebrated for your success. Your satisfaction is more internal, though you don't mind a quiet pat on the back for the work you have done so well.
- You usually do what you say you will do. As a result, you are careful about what you agree to do.
- You have the patience to work on things until they meet your standards of excellence.

Keys to Fundraising for a Mission Controller

- A thorough review of material about the organization, the prospect and what is expected of you in the fundraising process.
- Well-organized forms that enable you to plan carefully for each solicitation. (Proposal) (Brochure/Case/Impact of Gifts)
- Accurate and complete information about each person you are to solicit. (Solicitor Briefing)
- A written statement of the key points you should cover in the solicitation, including the amount of money you are to ask for. (Solicitor Briefing)
- Drafts of letters to send in advance of your visit that you can fine-tune to fit your style.
- A system to capture and report all of the information you gleaned during your visit.
- Opportunities to try out or review your pitch. (Role Play/Active listening practice)

Asking Style: Kindred Spirits

You are an **intuitive introvert**. This results in the ability to think quickly and fluidly and to draw energy from your experience. Your feelings motivate you to be generous. You have a strong desire to help those who need help and you want others to do the same. It's a challenge for you to find the courage to ask people for money, but you are willing to do this when you care deeply about the cause. Because your passion is contagious, you can be a very successful fundraiser.

- It's hard for you to say no, and equally hard for you to have someone say no to you – particularly when the rejection seems personal. (which it almost always does)
- You care about the people who are served by your causes, and you have many good stories to tell about how their lives have been changed.
- Though you are not a natural extrovert, you are a good listener and this makes you effective in one-on-one meetings and with small groups.
- Your power as a solicitor comes from your ability to listen and intuit the responses of the people you are soliciting.
- When you talk about the cause, your commitment will carry the day.

Keys to Fundraising for a Kindred Spirit

- Your motivation to ask will parallel the extent of your commitment to the cause.
- Take the time to become well acquainted with your organization's programs and the people it serves before soliciting gifts.
- Sample letters and a script for the ask will be helpful to you. (Solicitor Briefing)
- Be sure to practice your "pitch" on family or friends before you approach a donor. The more polished it is, the more comfortable you will feel. Experiment with how to present the organization's story until it feels right to you. Or ask for another staff or volunteer to go with you.
- Practice not taking no personally. Remember that there are often many no's on the way to yes. The person who declines to contribute today may still become a major donor tomorrow.

What to Say in Soliciting Prospects

Do Not Say

Any amount will do.

We've got you down for \$25,000.

Can you help us with a gift?

I made a one-time gift.

When may I know your decision?

You probably have made up your mind about what you are going to give.

Keewaydin needs the money.

How would you like your name on a plaque?

Do Say

We need these gifts (Use Gift Chart for Success) to be successful.

Would you consider \$5,000 per year for five years?

We need thoughtful and generous support from people like you who appreciate the importance of Keewaydin and all that it offers.

We have a five-year pledge period to make it easier for all of us to maximize support with relative ease.

We would like to have a decision by our _____ report meeting. I will be in the area on _____; do you mind if I call on you that day? How about at _____?

I would like to explore some areas where your support can make a difference for Keewaydin and perhaps be meaningful to you and your family as well.

Your investment will mean we will be able to build financial support for Keewaydin and continue ... for future generations.

A meaningful way to contribute is to make a gift in memory or in honor of families or individuals. Here are some Gift Recognition Opportunities you may want to consider. I did the X in honor of my _____.

Do Not Say

A couple of prospects I have solicited were unable to give at the asking level.

I know you have lots of commitments in addition to Keewaydin.

The Campaign Goal is \$_____.

We need to average \$20,000 per donor to be successful.

What can you afford to give?

Do Say

Most people have carefully considered the asking figures when presented to them. _____ have given exactly what we had asked them to consider. Others haven't been able to do quite that well, but almost everyone we have talked to has been willing to consider stretching for this campaign.

In light of your involvement as a supporter of Keewaydin, would you consider a gift of \$_____?

Our goal has not been set. It will be determined in large part from the level of support from those closest to Keewaydin. Our minimum needs are \$XM.

We will need gifts of all sizes to be successful. Averages do not work in fund raising because everyone's circumstances are different.

What aspects of the plan appeal to you most? Would you like to fund the X if you could?

How Major Donors Like to be Solicited

THE ART OF PHILANTHROPIC SOLICITATION BY THOSE WHO DO IT BEST

Quotes from Ben Franklin and John D. Rockefeller have been a major source of training for campaign volunteers for many years. These tried and tested suggestions have endured so long because they work and because they were offered by philanthropists whose good works have also endured.

Following are the suggestions of some contemporary philanthropists who were asked how they prefer to be solicited for a major campaign pledge. Each of these observations was made by a major donor involved in a campaign in recent years.

FROM NEW ENGLAND by an individual who has participated in many local and regional campaigns and whose most recent gift was a \$3.5 million challenge:

"All the standard rules apply where I'm concerned. I have to know a lot about the organization soliciting my investment, ideally over a long period of time; and I am certainly more likely to support endeavors in which I am actively involved."

"There is no logic in giving. Donors think emotionally, out of prejudice and preconception, out of knowledge and involvement or absence of one or both. The program, however, must be able to stand the test. Donors want an honest statement of the facts so the solicitor must be well prepared and be able to make a clear and concise presentation of the facts."

"Interested donors want the best—the best colleges, the best libraries. Show me how my support can make the institution the best and I will be interested."

"I want to be approached courageously and with no apology. Ask for the order. Be specific. Tell me what you would want from me. Ask for a bit more than you expect to get!"

"Most importantly, believe in the program and demonstrate that belief by your own gift, it will be evident to me through your words, mannerisms and actions."

CONCLUSIONS

- Be prepared to articulate a sound case.
- Make a brief, clear and concise presentation.
- Use emotion as well as facts.
- Ask for a specific, reasonable, and challenging gift.
- Demonstrate your own commitment to your prospect.

FROM CANADA by a corporate chief executive who has chaired multi-million-dollar campaigns and who has recently pledged a seven-figure gift:

"As a prospective donor I expect to be seen personally and I appreciate knowing in advance of the meeting what we're going to talk about. I want to know what other donors - especially competitors in the markets where we are active have pledged."

"Perhaps most importantly, I want to have access during the decision process to someone who really speaks on behalf of the organization I am being asked to support, preferably its chief executive office. I want to know that the recipient of our generosity will use these funds well."

"I like to be made to feel that we are needed."

"It always helps if the volunteer who calls or writes for an appointment is someone who has helped me in the past and someone I know and respect."

CONCLUSIONS

- Make personal visits.
- Use benchmark gifts of others to raise sights.
- Visit in teams and use Mike Peluso and Derek Pierce as valuable resources.
- Make the prospect feel needed.
- Identify the best possible volunteers.

FROM PITTSBURGH by a corporate president chairing his first campaign and who made his first major six-figure gift during that campaign:

"An informed volunteer is critical. Be sure you have an adequate command of who the institution is, what makes it different, what special role it plays in the community and what particular contribution it makes to its field. The volunteer must be the one who sells the institution to me."

"Emphasize the voluntary spirit that helps improve the standard of living or the quality of life for my neighbors. The spirit of people helping people is a distinguished part of our American birthright."

"Do your homework first! Have a good idea about my personal giving profile. Learn about the policies and practices of my corporation or corporate foundation. Know the causes with which I empathize and why. Know what level of support is appropriate for me and discuss that amount with me."

"Know as much as possible about the institution and who it serves and have additional resources available. Those in charge of the institution should be a part of the effort to gain my support."

CONCLUSIONS

- Know the campaign story; know Keewaydin and who they serve.
- Sell the prospect on the unique value of Keewaydin – the Case.
- Emphasize volunteerism.
- Know all about your prospects including values in common with Keewaydin.
- Suggest an appropriate level of support.

Thank You

So often during a campaign we focus on dollars raised or still left to raise, but our true focus needs to remain on the people supporting the organization through their tireless volunteer efforts.

We thank you for the many ways you support and help Keewaydin be successful!