

Asking for Major Gifts

STEPS TO A
SUCCESSFUL
SOLICITATION



THE ASSOCIATION OF FUNDRAISING PROFESSIONALS (AFP)

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**Steps to a Successful
Solicitation**

**By Peggy Calhoun, ACFRE
and
Richard G. Miller, CFRE**

AFP's Ready Reference Series
Association of Fundraising Professionals

In the spirit of philanthropy, the authors dedicate their efforts and donate their writer's fee for this booklet to the AFP Foundation for Philanthropy.

This booklet is the sixth in AFP's Ready Reference Series for professional fundraisers.

Text by Peggy Calhoun, ACFRE, and Richard G. Miller, CFRE.

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What Makes a Good Major Gift Solicitation? ---

Conducting a solicitation campaign is like launching a ship and guiding the vessel through waters. A crew of informed, committed professionals prepares, navigates, sails and docks the vessel. The campaign leaders are at the helm of this ship, while the donors are its passengers. The backbone of this vessel is the ship's keel. An organization's development effort is the keel—the backbone extending from bow to stern with all of the ship's structures attached—while the development professional is the guiding force.

All fundraising programs and campaigns are predicated upon three key elements: relationships, a case for support and teamwork. First, by cultivating relationships with its donors, an organization can successfully build its giving base, especially in its major-gift segment. Second, a charity will generate increased giving by clearly communicating its needs and by offering creative ways for donors to support the mission. Third, an organization can most effectively develop these relationships and communicate its case for support through a dedicated solicitation team.

By building a compelling case for support—or reason to give—a nonprofit educates its prospective donors, motivating them to contribute. Clearly presenting your case for support is a chief component of cultivating donors and key to a successful solicitation. An exciting case for support also generates enthusiasm among staff and volunteers, who convey this information to prospects. When your team members

Relationships
+ Case
+ Teamwork
= Donations

Why Do They Give?

are enthusiastic about your case, they can more effectively explain how the charity fulfills its mission through its programs and services and how a prospect can participate. How much prospects understand the need and are directly involved with the institution over time will directly affect how often and how much they will give. Having a solid case for support is essential for all of your solicitation materials.

An Enthusiastic and Prepared Team

Building an effective solicitation team and matching the right solicitor to a prospect is another hallmark of a successful solicitation. Your team should comprise the right mix of staff professionals and volunteer leaders who model stewardship giving. In the solicitation process, the staff professional plays educator, communicator, planner and motivator to the team of volunteer solicitors. Solicitors must be adequately prepared, informed and confident about the case for support, the campaign plan, leadership and mission of the institution. Their confidence and support will generate an enthusiasm that the prospect will see, feel and respond to in a positive manner. Staff professionals train the team of volunteers in prospect screening and solicitation so they may be confident, comfortable and enthusiastic about the process. Confidence is also determined by their own stewardship and monetary support of the institution. Therefore, solicitors must be the first to *give* leadership gifts, if they expect to receive them.

MANY HATS

The role of the staff professional can be defined as educator, communicator, planner and motivator.

Converting Small Donors to Major Donors

Donors, whether foundations, companies or individuals, do not usually make large philanthropic contributions until the charity has earned their trust and respect. A nonprofit organization generally can track that trust in the relationship through donor loyalty:

Has the donor given smaller gifts consistently? Does the donor communicate frequently with the charity? How an institution handles these smaller gifts and interacts with its donors can greatly affect the frequency and amount of future gifts. By treating small-gift donors as future major-gift donors, a charity can effectively cultivate a long-term relationship: Donors who give consistently and frequently are often ready to make a major gift. They just need to be presented with a reason to give more and the right opportunity to do so.

WHAT IS A MAJOR GIFT FOR YOU?

A major gift is a donation in an amount that is significant to the organization, whether it be \$100 or \$1 million or some amount in between.

In summary, three key components are necessary for a successful solicitation: qualified, educated prospects; the right team of well-prepared volunteers and professional fundraisers; and a compelling reason to give.

A DONOR'S GUIDE TO CHARITIES

Today's donors are more sophisticated and educated than in previous generations because of technology and unfettered access to a wealth of information. For example, data on any U.S. charity can be easily found via the Internet. One website, www.guidestar.org, lists the IRS Form 990s of U.S. charities. Guidestar, a nonprofit organization, also provides many other services and information to funders and professional charitable gift planners.

Team Building

Who Recruits? The Board Resources Committee

As mentioned in Chapter 1, before an organization can begin soliciting for major gifts, staff fundraising professionals must put together a team of volunteer leaders. The volunteers should be interested, involved and enthusiastic in their own financial support of the organization. When building and training your solicitation team, keep in mind the Five R's of asking for a gift: The *Right* person asking the *Right* person at the *Right* time for the *Right* amount for the *Right* project.

These are some traits of a good solicitation team member:

- **Is identified as a volunteer leader of the nonprofit**
- **Has committed a leadership gift to the organization**
- **Is respected by other volunteer leaders and staff professionals**
- **Enjoys a history of giving and volunteering to the organization**
- **Advocates teamwork**
- **Gives time freely to the nonprofit**
- **Interacts frequently with other community leaders and donors**
- **Is open to suggestions, challenges and new ideas**
- **Listens carefully**
- **Understands and articulates the organization's case for support**

- **Appreciates planning**
- **Actively cultivates the interest of others**

Once potential members for the team are identified, recruiting begins. Usually the chief executive officer, the board chair and the development professional call on the volunteer leader. During this meeting, information and expectations are fully shared, including the case for support and fiscal goals. The volunteer leader is also asked to give a leadership gift during the recruitment call, since his or her giving level will affect the size gift he or she will be comfortable asking others to make. Often, he or she also receives a written volunteer position description with a draft of the campaign plan. Then, together they determine the next steps of involvement, including identifying other members of the solicitation team, recruiting strategies and a plan of action.

To ensure clear expectations and healthy participation from your volunteer solicitors, the development professional should immediately give them a schedule of important dates, such as team meetings, tours and training workshops. Each meeting date ought to include a location and a starting and ending time. Team members should be required to attend at least one solicitation training session including role-playing practice, which usually takes about 1.5 hours. Afterwards, the development professional can offer additional coaching to team members wanting to grow in confidence and comfort levels during solicitations.

Educating team members includes detailing the case for support, fiscal goals, staff roles, volunteer assignments and the importance of stewardship giving. All these items would have been

THE PLAN IS PLANNING

“Plans are nothing; planning is everything.” —Dwight D. Eisenhower

touched on during the cultivation and recruitment process, but will need amplifying. Once the team is recruited, the development professional or fund development counsel should conduct a workshop for solicitation training.

Training Your Team

Workshop dynamics are an important building block for successful solicitations and should instill a sense of confidence in the team solicitors. Every attendee must have a chance to role-play, practicing setting the appointment and asking for the gift. Each solicitor should practice open-ended questions to generate more information from the prospect and close-ended questions to help the donor decide to give.

When planning a solicitation workshop, remember:

- 1. Keep the size of the group small (no more than 12) so that everyone will have a chance to participate and receive individual coaching from the presenter.**
- 2. Carefully lay out the room, including props, equipment, lighting, materials and seating arrangements. Use name tags if participants do not know everyone.**
- 3. Rehearse and time each segment of the workshop.**
- 4. Compile summary points of the presentation to distribute to the participants.**
- 5. Provide written scenarios of the roles the participants are asked to play.**
- 6. Encourage questions and suggestions throughout the workshop.**
- 7. Assign prospects to solicitors prior to the workshop.**
- 8. Begin scheduling appointments immediately after the workshop.**

9. Stress reporting outcomes and activities to staff.

10. Offer ongoing support and attendance on all solicitation calls.

(For a sample workshop agenda and handout, see Appendices A and B.)

Targeting Your Prospects ---

Once your team is in place and trained, you can begin preparing your strategy. Your success in bringing in major gifts will depend on how well you plan and which tactics you use. Key elements to a successful solicitation include identifying prospects, cultivating the relationship, asking for a donation and building on the relationship through recognition and good stewardship.

Step One: Identify Your Prospects

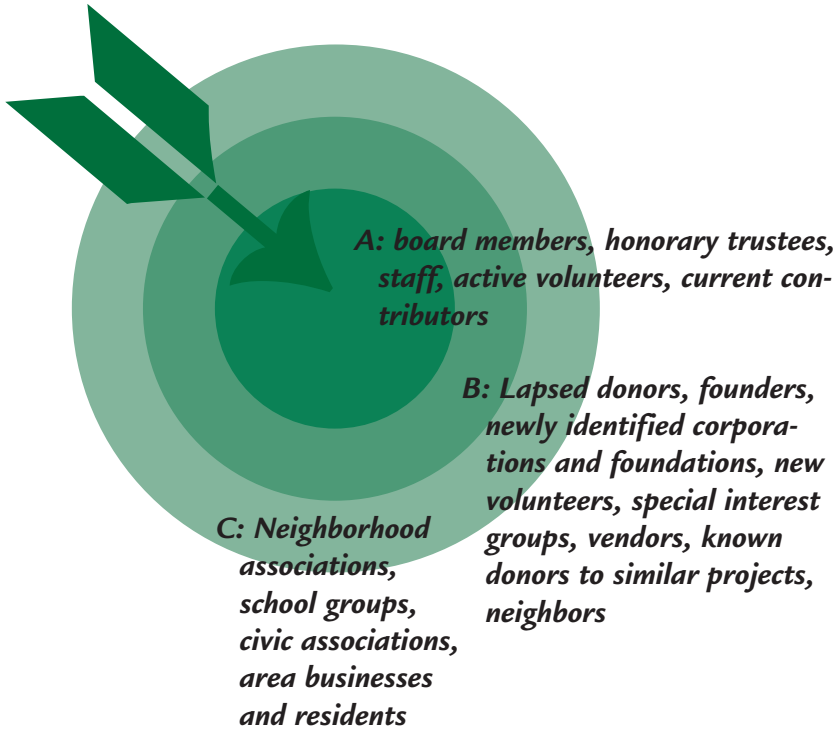
Wealth is not a sole indicator of a good prospect; philanthropy is a learned behavior and often the most generous donors are not necessarily wealthy. However, the combination of generosity *and* wealth will help to identify major-gift prospects. To help

STEPS TO A SUCCESSFUL SOLICITATION

Since donor loyalty is based on the strength of a relationship, solicitation is a year-round process. To succeed in your solicitations, your organization should systematically engage in the following activities:

- *Identify your prospects*
- *Inform them of reasons to give*
- *Promote the organization*
- *Involve them in the organization*
- *Ask for the donation*
- *Recognize the gift*
- *Steward your donors and their donations*

find these potential donors, keep in mind that prospective funders usually fall into one of three categories:



To start your list, begin by looking inside your organization by identifying known contributors, past and present. Individuals and their foundations and businesses who are already involved in the institution as current donors, staff, trustees, honorary board members and active volunteers are your best prospects, your “A” list. Research their interests and reasons for giving to help your team pinpoint the right solicitor to present the right giving opportunity.

Add to your list of prospects by collecting names suggested by your volunteers, including

REMEMBER TO ASK THE “FAMILY”

Giving begins at home, so don't forget to ask those most intimately involved in your organization—your staff, trustees and dedicated volunteers. Your trustees and staff professionals in particular should be your first port of call in a fundraising campaign, as their pledges will help build momentum among their associates. And do not forget to send the right person to make the request—a peer who gives at the same level.

your board members and fund development leaders. Then collect names from outside, but related, sources—donors to similar causes. This last group of names is considered a “suspect” list rather than a “prospect” list because the individuals may not be aware of the services, programs and history of your organization.

Rank Your Prospects

When you have a comprehensive list, separate the names according to a category (A, B, and C, for example). Rank each prospect by assigning a grade, or symbol, such as A = prospects most likely to give now; B = prospects who have good potential to give but require additional cultivation; and C = prospects who will require a series of cultivation strategies prior to solicitation. Do some informal research by asking your team members who know the prospects about their giving habits, community involvement and interests. Many database programs, such as Wealth ID and Marquis Who's Who, exist that can help your team manage your prospect list. If an organization has the ability to electronically screen prospects or to individually research prospects, this step can be eliminated.

Then, conduct prospect screening and rating to determine the correct approach *per prospect*. Place the names of some of the A list prospects on the Prospect Tracking and Rating Form (See Appendix C). Invite five to seven volunteer leaders

to a private meeting to review and qualify prospects and brainstorm the best methods of cultivating their interests. You do not want to overwhelm your volunteer leaders, so looking at a shorter list of prospects will keep them focused and give them a sense of accomplishment as they begin soliciting.

THE FIVE R'S OF ASKING FOR A GIFT:

The Right person asking the Right person at the Right time for the Right amount for the Right project.

Decide on a personalized plan for each prospect by reviewing the Five R's of asking for a gift: Who is the best person to solicit this prospect? Is this prospect ready, or is more time needed to cultivate interest? How much *could* the prospect give, if properly motivated? What would motivate the prospect? Is there something we have in our case that might be especially appealing to this prospect? This research can help create a personalized cultivation plan for each prospect. Also, whether or not a prospect is already a donor will affect the cultivation strategy.

Personalize Your Prospecting Plan

Key to effective cultivation is matching the right solicitors—usually one staff professional with at least one volunteer leader who is a peer of that prospect. Each member of the solicitation team will want to help advance the solicitation effort. However, remember not to assign more than five prospects to each member of the solicitation team to keep the assignment manageable. Once a solicitor has completed these calls, additional prospects can be assigned.

Cultivating and Educating Your Prospects

Once your solicitation team is trained and prospects have been identified and assigned, the next phase is cultivating your potential major-gift donors. Cultivation includes educating your prospects through information, building awareness of your programs and involving them in your charity. For current donors, cultivation entails building on existing relationships, focusing on programs already of interest or introducing the prospects to other projects.

Your nonprofit can pique prospects' interest through a series of informative sessions, such as touring your facility, hearing personal testimonials from those served by the organization and visiting the community touched by your programs. Imagine a prospect watching senior citizens smile because of the care given to them, or a student learning how to play an instrument or an artist rehearsing a performance. Such cultivation activities often evoke fond memories. Always be on the lookout for opportunities to educate, inform and interest prospects.

Building Awareness Through Peers

Your volunteer leaders begin to step out fully in this phase, building those relationships through personal interaction as peers, sharing their own stories of involvement and support. Brochures, videos, websites and television spots are informative, but not as memorable to the prospect as firsthand experience of the mission in action through the eyes of those already involved. Sharing in their own words about

the charity's projects personalizes the mission for the prospects.

While cultivating donors and greater giving, encourage your prospects to volunteer. On-site volunteers frequently enjoy the interaction with clients, students, staff and other volunteers. This interaction will build a deeper bond with the mission of the organization and those it serves. Allow the prospect to *learn* more about the institution through positive volunteering experiences where the case for support is witnessed firsthand.

Since people give to people, peer involvement is important in building toward the successful solicitation, establishing mutual respect and trust early in the process. Prospects must feel that a project deserves not only their support, but also the support of others. Your volunteer leaders will make that connection for them, especially if they lead in the area of giving.

The prospect may ask, "Who else has given?" or "How much does the board give?" Your team members need to be prepared to show the list of other contributors. When your organization begins to receive other major gifts, let your prospective donors and current supporters know to continue to build the momentum.

During the cultivation effort and prospecting stages, staff professionals are trusted to keep good records about the activities and interests of the prospect. Some development offices rely on software to track donor readiness while others use forms placed in each prospect file. Whether in an electronic database or on paper, excellent management of prospect data is essential. All files are treated confidentially and carefully kept. Whatever the method, good recording is vital to the advancement of donor relations and campaign management.

Tracking Interest

Determining prospect readiness is about gathering the right information, not only from others, but also from the prospects themselves. If frequent interactions with prospects occur, then enough information will be collected to determine their giving interests and potential gift levels.

To advance these relationships, the solicitation team should ask the following questions:

- 1. What is the best follow-up with the prospect and by whom?**
- 2. Should the spouse, family member or significant other be asked to join future meetings?**
- 3. Would the prospect enjoy receiving updates? If so, what is the best method—email, eblasts, facsimiles, videos, personal letters, telephone calls, visits, photographs and similar media?**
- 4. How many pieces (appeals, newsletters and reports) are sent by our organization to the prospect annually? Does the prospect value this information?**
- 5. How can the next visit become more meaningful?**
- 6. Are the visits too long to keep the prospect's attention?**
- 7. Would a better time of day be more appropriate?**
- 8. Are there other client or institutional activities that may interest the prospect?**
- 9. Does the chief executive officer or other trustees interact with the prospect in meaningful ways?**
- 10. What more could the organization do for the prospect?**

If more information is needed, continue cultivating the relationship by learning more about the prospect's opinions and interests. Perhaps the A-list prospect was actually a B-list prospect. When cultivating a prospect, always look for ways to have more meaningful interaction to deepen the relationship.

SAMPLE CONFIDENTIAL CONTACT SHEET

Date of Contact:	December 1, 2004
Form of Contact:	Home Visit
Length of Visit/Call:	45 Minutes
Name of Prospect(s):	John and Jane Doe
Account #:	26407
Address(es):	123 Island Drive Longboat Key, FL

Purpose: Cultivate interest for an increased gift at the \$10,000 level.

Summary: Mr. and Mrs. Doe were contacted by Joe Smith, director of development, to express appreciation for past annual support and to encourage a tour of the new facility. Mr. Doe was interested in learning more about who is currently serving on the board while Mrs. Doe was interested in the new volunteer coordinator. Arrangements will be made for the Does to tour the west wing, meet the new volunteer coordinator and to join long-time friend, Mr. Chair, for lunch. Mr. Chair, with other members of the development team, will introduce the new gift levels and request a gift renewal of \$10,000.

Next Action Step: Within one week, Joe will contact Mr. Chair and coordinate a late-morning date for mid-September during which solicitation specifics will be discussed.

cc: CEO
Director of Development
Assistant Director of Development
File

HOW READY ARE THEY TO SAY YES?

When interacting with a new prospective donor, a solicitor needs to listen for questions and statements that may indicate interest and tailor the conversation accordingly. For example, when discussing a particular project, if the prospect expresses interest in a certain area of the project, focus just on that area and keep the dialogue open-ended so you can follow up with a second visit.

Consider this sample conversation occurring after a tour:

Development professional: “What do you think about what you’ve just seen?”

Prospect: “I never knew this organization did so much!”

Development professional: “What in particular do you find most interesting?”

Prospect: “It all looks good but I’d like to learn about the ABC program. How does the community know to come here for this service?”

Development professional: “It all started by word-of-mouth within the community. We would like to serve more but we require a bi-lingual outreach counselor, materials written in Spanish and a few other items. We have the room but not all of the resources.”

Prospect: “How much is needed?”

Development professional: “The total annual budget is \$100,000 for the first year. The local church will provide the buses and drivers. We know that the project will pay for itself in the second year so we’re searching for the initial investment of \$100,000.”

Prospect: “I see. What does your board think?”

Development professional: “They love the idea! Reaching into the Hispanic community is part of our long-range plan and this is a great way to do that. Would you like a copy of our plan? I can provide the budget, too.”

Prospect: “Sure, I’d like to see it.”

Development professional: “Good. Let’s stop by my office on the way out. I’d like you to meet a few other key people who worked on the long-range plan.”

Prospect: “Lead the way!”

The development professional sensed the prospect’s interest and sought to advance that relationship with additional information and introductions. Once the prospect reviews the organization’s long-range plan, the prospect should be invited to become more involved, possibly meeting with the board chair, chief executive officer and others. By actively educating the prospect, building awareness and encouraging involvement, the development professional is setting the stage for a successful solicitation.

Setting the Stage for the Solicitation

As the solicitation team's chief motivator and planner, the staff professional will help ready the appointed solicitor for the ask, providing him or her with the right materials, including solicitation kits, written proposals and personalized pledge cards. By this point, the solicitor should have been through a solicitation training workshop where he or she could role-play asking for the donation. However, these skills may not be as fresh in the hearts and minds of volunteer leaders. If they need a brush-up in confidence and training, the staff professional could offer additional coaching—even to your chief executive officer if he or she will be going on a call.

REMEMBER THE FIVE R'S:

The Right person asking the Right person at the Right time for the Right amount for the Right project.

Pre-Appointment Arrangements

When the solicitor is ready to make the ask, the appointment can be set. To help build confidence and momentum, start with the easiest prospect first. Decide who will call the prospect to set a date, time and place and be sure to tell him or her who will be participating in the meeting. You will want one or two other team members at the meeting, but only the appointed solicitor should make the request for the donation amount. Even when making the appointment, asking the right question to prompt the desired response is important. Rather than saying, "When can you meet?" suggest an exact time and location: "How does next Wednesday here at 2 o'clock sound to you?"

Alert the development office and key staff professionals that a solicitation will occur. The office will prepare a personalized pledge card and an information kit tailored to the prospect. (See Appendices C and D for sample pledge cards.) For major gifts, the development professional will

SAMPLE SOLICITATION AGENDA

FOR INTERNAL PURPOSES ONLY

Solicitation Time/Date:	December 1, 2004 10 a.m.
Solicitation Location:	On-site
Attendees:	Prospects Mr. and Mrs. John P. Smith; board chair, CEO and director of development
9:30 a.m.	Board chair and staff professionals meet in CEO's office for review.
10:00 a.m.	Mr. and Mrs. Smith arrive; tour begins in east wing and concludes in library.
10:30 a.m.	Coffee, tea and bagels in library.

AGENDA

1. Update of long-range plan by board chair
2. Program outline and budget by CEO
3. Leadership giving to date by board chair
 - Recognize current board giving
 - Recognize Mr. and Mrs. Smith's past giving and outcomes
4. Board chair asks for a leadership gift
5. Review and summary of discussion by director of development
6. Prospects are thanked by board chair, CEO and director of development and walked to east wing entrance.
7. Board chair accompanies Mr. and Mrs. Smith to their car.

usually prepare a written proposal to help guide the meeting. Decide on an internal agenda and proceed with making the necessary arrangements to alert the appropriate parties.

As a team, decide on a packet of materials for the prospect suited to his or her interest and giving history. At the very minimum, the solicitation kit should include the personalized pledge card, brochure or case statement, recognition levels, board roster, staff professional's business cards and supportive information tailored to the prospect's interest. Some prospects, particularly foundations, will require proof of tax exemption.

For solicitation kits that are used in a capital campaign, provide the details about the organization, programs and staffing requirements that are usually in a written proposal. Also include major campaign gifts received to date, an architectural rendering, building layout, campaign cabinet roster and the breakdown of the goal amount.

KNOW YOUR STATE REGS

For information on whether or not your state requires disclosure statements on solicitation materials, visit the AFP Fundraising Resource Center at www.afpnet.org, or contact AFP by phone: (800) 688-FIND (3463) or email: resctr@afpnet.org. According to the Resource Center, the www.multistatefiling.org website also has the Unified Registration Statement, which can be used to register a organization in all states except Alaska, Arizona, Colorado and Florida—all of which require their own specific registration forms and protocols. Eleven states do not require registration for fundraising (Nevada, Idaho, Montana, Wyoming, Texas, South Dakota, Iowa, Hawaii, Indiana, Michigan and Vermont). Each of those states' attorney general's office should cover any additional regulations pertinent to fundraising. A full contact list can be found at: www.naag.org/ag/full_ag_table.php. For a quick list of fundraising regulations and state registration visit: http://multistatefiling.org/n_appendix.htm.

Practice, Practice

Before the meeting, the team members going on the call might want to rehearse a script for the solicitation with each other, practicing various responses so that everyone will be comfortable and involved. Everyone who will be on the solicitation call should review the contents of the solicitation kit, read the proposal and know the specific amount and solicitation agenda.

The solicitor should anticipate the prospect's questions and potential objections. Make a list to go over with the staff professional or team and think through the best answers for each question before setting a meeting date with the prospect. Remember that close-ended questions move the solicitation process along while open-ended questions garner opinions, attitudes and beliefs. Both types of questions are necessary in a solicitation, but it is important to know which to use and when.

Before your meeting, practice using open-ended and close-ended questions. Open-ended questions are used to invite suggestions, learn opinions and seek a greater understanding. For example, if you want to gauge your prospect's interest, you might ask, "What did you think about last night's auditions?"

In contrast, close-ended questions seek agreement and move the discussion toward its conclusion. For example, you might ask during the solicitation meeting, "Did you have a chance to review these plans?" Close-ended questions are always used when asking for a specific amount: "We'd like to request from you a gift of \$100,000 for this project. Can you do that?" At this point in the conversation, to use an open-ended question could be disastrous. If you asked, "We're here today to ask you to support this project. How much would you like to give?" the result could be a far smaller commitment than what you had planned.

When the time comes, remember to ask for a specific amount and then stop talking. Allow the prospect time to think and respond first to the question.

LOCATION, LOCATION

Avoid restaurants as a meeting location. If the server approaches the table immediately following the ask to inquire if you want coffee or dessert, the moment may be lost. Pick a place that will allow you to speak freely without distractions or interruptions.

The Ask and Follow-Up ---

Your team has reached the apex: the ask. Adequate planning beforehand and listening carefully during the meeting are vital to the solicitation's success.

Following these tips will help your solicitation team stay focused and succeed:

Tip #1: Anticipate your prospect's questions beforehand and have answers ready. If technical questions are anticipated, consider including the appropriate staff member on the call.

Tip #2: Review the contents of the solicitation kit and the solicitation agenda one hour before meeting with the prospect.

Tip #3: Always verbalize the specific dollar amount requested rather than having the prospect read the materials.

Tip #4: Once the ask has been made, remain silent and allow the prospect to respond.

Tip #5: Encourage pledging the amount and suggest an exact amount that can be paid on either a quarterly or monthly basis. This is especially effective with staff, who can use payroll deductions to make a donation.

Tip #6: Always request a specific dollar amount from a qualified prospect using a close-ended question or suggestion. Example: "We're here today to ask you to support the library campaign with a lead gift of \$1 million. Would you do that for

our community?”

Tip #7: Remember that objections and questions are opportunities for more information. For example, if the prospect says a certain amount is too much money to give right now, encourage him or her to make a pledge for that amount and give at the earliest convenience or in more manageable installments.

Tip #8: Get the commitment in writing! Only signed pledges are valid. Verbal commitments are not acceptable by accounting standards.

Tip #9: Be prepared to discuss a deferred gift.

Tip #10: No does not mean *never*, it means *not now*. Leave the door open for other options. Review the Five R's of solicitation again and see which element needs tweaking. Perhaps the timing of the solicitation was not right or the project did not appeal to the prospect as much as you thought it would.

Tip #11: No matter the prospect's response, always conclude each call with a “thank you.”

Tip #12: If a second appointment is necessary, schedule the next visit at the conclusion of the meeting. Sometimes prospects need more time to consider the request, perhaps sharing the solicitation materials with a spouse, colleague or business partner, or even a financial planner. If appropriate, offer to meet with these individuals.

Ideally, your volunteer leader is the one who will ask for the donation, as he or she has cultivated the relationship with the prospect and set the stage for the request. However, your staff professionals play an integral part in the solicitation

A SCENARIO FOR THE ASK

A current donor has been giving \$500 biannually to a nonprofit for the past four years, and the solicitor is asking him now to make a \$10,000 pledge to the capital campaign. The charity wants to promote quarterly pledge payments over a three-year period. This gift would incorporate his annual support while simultaneously supporting the capital campaign. The gift would be recognized at the \$10,000 campaign level.

Prospect: “I don’t know about a gift that size. That sounds like a lot of money.”

Solicitor: “Yes, I know. My wife, Jean, and I decided to commit a gift of that amount ourselves. In order for us to afford that, we’re making quarterly payments over three years. When you think about it, that’s less than \$70 a week. Our school is certainly worth that amount, don’t you think?”

Prospect: “Yes, it’s worth it and I’d like to do something, but right now my business is too slow for me to make a commitment like that.”

Rationale and action: The prospect is committed to the campaign but feels the gift is not as affordable under the proposed terms. The solicitor needs to acknowledge the response and explore alternatives.

Solicitor: “I understand. And I’d still like to see both of us at that level, as I’m certain others will follow. How can we do this? Would you like a longer payout period?”

Prospect: “What did you have in mind?”

Solicitor: “How about your same gift amount of \$500? Instead of making it bi-annually, do that amount quarterly over a five-year period. That’s about \$20 a week. Is that possible?”

Prospect: “Sure, that is, but that’s a long time.”

Solicitor: “When your quarterly reminders are sent, you could always pay it off earlier when your business is better.”

Result: The solicitor perceived interest in giving and was able to create a viable alternative. The charity secured the desired donation and the prospect was able to give over an extended period that fit with his comfort level.

process, building the team by calling on volunteers to open doors, solicit friends and colleagues and recognize their own stewardship giving. They tend to coach offstage, but they are ready to step in at a moment's notice.

Sometimes the development professional will need to close the gift no matter how much planning and rehearsing were previously done with volunteers. The volunteer may not be able to make the appointment, leaving staff to ask for the gift. Even if this does happen, be sure to credit all members of the team for their efforts to bring in the donation. Relationships and teamwork are the foundations of a successful solicitation effort. Even if the gift was successfully closed by the development professional, the cultivation of the gift was done in advance and the successful closure is just the culmination of the process.

After the Call

Immediately after the prospect has left the meeting, the staff professional should debrief the members of the solicitation team and plan the next steps, including thanking the donor, announcing the gift internally and, where appropriate, public recognition. Send thank-you letters immediately, preferably as soon as possible after receiving the gift. That same day is great, the next day is good, but a week later might make the donor wonder how important the gift really was.

Recognizing a gift, no matter the amount, is part of the cultivation strategy for the next gift. For public recognition, seek donor approval *prior* to announcing that gift. In fact, your team may offer naming opportunities to encourage greater giving, but a donor should decide on such prominent recognition at the time of the gift. Remember to follow this agreement with a letter thanking the donor and detailing the specific details, such as the exact name(s), payment schedule, announcement date and similar topics that

were agreed upon.

Even if the donor would like to remain anonymous, assume he or she would like to receive private updates periodically. Use discretion in announcements, tours and printed materials. The guiding principle for recognition is to be prompt, efficient and economical. For IRS guidelines for acceptable gift recognition, visit the webpage, www.irs.gov/pub/irs-pdf/p1771.pdf.

THE POWER OF A THANK-YOU

Recognizing a gift, publicly and privately, is the first step in the re-solicitation of a donor.

Public recognition for certain gift levels is common and often used to promote support from corporations, especially when they are using marketing dollars to fund the gift. Some recognition opportunities include naming a building or room, listing the donor on a plaque or featuring the donor's name prominently on printed materials.

However, not all gifts garner public recognition, particularly smaller donations, but there are other means to acknowledge them. A thank-you letter, a follow-up phone call and a verbal thanks when you next see the donor are important ways to recognize a donor. Create meaningful ways to personally and promptly thank your major-gift donors and you will cultivate future gifts.

Once the gift is secured, the development professional also needs to process the internal paperwork, preparing the confidential contact sheet for internal distribution. The accounting department usually keeps the original signed pledge card and similar documentation. For more complex solicitations, such as a gift of real estate or negotiating a naming opportunity, a memorandum of understanding should be drafted by the development professional and shared with the campaign chair, board chair and the organization's chief executive officer for board approval.

As team leader, the development professional

also keeps the entire solicitation team and campaign cabinet informed by sharing successes and experiences—even if the experiences were not as positive as one would have hoped. Keeping the team apprised of incoming gifts encourages ongoing success.

Good Stewardship

Once a gift has been received, how you handle the funds and maintain the donor relationship will greatly impact his or her trust in your organization. Therefore, good stewardship of funds and donors materially affects the amount and frequency of future gifts. Each organization wishing to advance its philanthropic support should live by *A Donor Bill of Rights* (see inside back cover). This document advocates respect and consideration for the donor.

Benchmarks of Success ---

One of the most common benchmarks of a successful campaign is that pledges are paid earlier than anticipated. Staff professionals play an important role in this process.

When pledges are due, the accounting department usually sends out an invoice. For large payments, the development professional may wish to include a personal letter updating the donor or a photograph of the construction site or project. For annual campaigns, consider including a handwritten thank-you note from someone who was helped by your organization, such as a client, student or family. However, be sensitive about client confidentiality and ask permission in using photographs or personal stories. For multiyear pledges, maintain communication with your donors and encourage them to visit your organization.

Besides reaching a dollar goal, the organization experiences many other benefits in a successful campaign. A successful campaign has some of the following benchmarks:

- 1. The frequency of giving increases.**
- 2. The donor base expands.**
- 3. Volunteers become more active while volunteer inquiries increase.**
- 4. The organization gains clout within the community.**
- 5. Community affiliations increase.**
- 6. Professionals and support staff function as a stronger team.**

- 7. Unsolicited planned giving inquiries occur more frequently.**
- 8. Community confidence in problem solving occurs.**
- 9. Increased program offerings actively interest the community.**
- 10. In-kind support increases.**
- 11. Traffic to the organization's website increases.**
- 12. Attendance at annual functions and key events steadily rises.**
- 13. Per capita giving increases with each appeal.**
- 14. Leadership vacancies are more easily filled.**
- 15. Media inquiries rise.**

Each of these benchmarks can be directly traced back to the quality of relationships built with the donor base and the teamwork of the solicitation volunteers and staff. Solid teamwork, a meaningful case for support and deepening relationships with donors are key to the success of any fundraising campaign.

Appendix A:

SAMPLE SOLICITATION WORKSHOP AGENDA

- I. Preparation for the solicitation
 - A. Importance of knowledge
 - a. Mission and history
 - b. Goals and objectives
 - B. Case for support
 - C. Review contents of a solicitation packet
 - a. Brochure or case statement
 - b. Personalized pledge card
 - c. Commonly asked questions and answers
 - e. Gift recognition levels
 - f. Volunteer opportunities
 - g. Board roster
 - h. Annual report
 - i. Photos, testimonials, statistics, etc.
 - j. Other as predetermined
 - D. Staff support
 - E. Select the right team members
 - G. Share prospect information and screening results
 - H. Select specific amount to request
- II. Key elements in determining successful solicitations
 - A. Attitude of solicitors
 - B. Adequate preparation
 - C. Personal conviction
 - D. Personal commitment of time and talent

- E. Your own gift
- F. Use of close-ended and open-ended questions
- III. Placing yourself in the prospect's shoes
 - A. Typical questions and answers
 - a. Review the Q & A sheet in solicitor's packet and donor handouts
 - B. Anticipate prospect questions prior to meeting
 - a. Audience participation in listing questions
 - b. Audience participation in answering questions
 - C. Answering other objections
 - a. "I can't give right now." (Promote pledging)
 - b. "Who else has given?" (Inform prospect)
 - c. "I'll have to think about it." (Schedule follow-up)
 - D. What to do when a prospect offers a lesser amount
- IV. Personal solicitations
 - A. Making the appointment
 - a. Select time, date and location
 - b. Determine who will attend
 - c. Keep staff informed
 - B. Making the successful presentation—rehearse first!
 - a. Tailor to each prospect, walking in his or her shoes
 - b. Be friendly and comfortable
 - c. Review materials and agenda *prior* to the meeting
 - d. Determine answers to questions
 - e. Determine who will make the ask
 - f. Tell the story and case for support in *your* own way
 - g. Emphasize the critical importance of leadership gifts
 - h. Request a specific dollar amount
 - i. Ask and stop talking!

- j. Consider the reaction
 - k. Use the pledge card properly
 - l. What to leave behind
- V. Closing the gift
 - A. Examples of open-ended questions and close-ended questions
 - B. What to do if the answer is no.
- VI. Your last words (no matter what!)
- VIII. Summary
 - A. Distribute *Secrets to a Successful Solicitation*—Appendix B
- IX. After the solicitation
 - A. Address reporting structure
 - B. Recognition and thank-you follow-up
 - C. Plans for re-solicitation, if necessary
- X. Audience participation
 - A. Making the appointment
 - B. The solicitation
 - C. Audience sharing
- XI. Thank you for participating
- XII. Summary of highlights
 - A. Importance of stewardship
 - B. Importance of peer-to-peer matching and prospect screening.
 - C. No does not mean never, it means *not now*.
 - D. Distribution of assigned accounts

Appendix B:

WORKSHOP HANDOUT: SECRETS TO A SUCCESSFUL SOLICITATION

1. Your success in obtaining gifts will largely be determined by two factors:

- Your own financial commitment to this project.
- Your conviction and enthusiasm.

2. Please read carefully all the materials. Be thoroughly familiar with the mission, project, programs and case for support.

3. Do not procrastinate. See your prospects immediately. Campaigns have difficulty because prospects are not seen—not because they refuse to give!

4. See your prospects personally. Do not write. Do not telephone, except to make an appointment. Slight treatment merits slight results.

5. Take sufficient time to tell the full story and to interest each prospect in the project before you discuss participation.

6. Take it for granted that every prospect will want to have a part in the project.

7. Obtain substantial gifts by challenging your prospects to think big.

8. Consider whom to bring on the call with you and what materials to take. Determine the agenda for each participant.

9. Do not leave the pledge card “to be sent in.” If you do, in all likelihood, it will not be received or you will receive a token gift. Arrange for a second visit, if necessary.

10. Report on all assigned accounts. A campaign will succeed only by vigorous efforts within a reasonable schedule. Staff professionals will keep you informed of the campaign progress to date.

11. Suggest an amount for consideration in order that your prospect may have something against which to measure a response. Once the prospect is asked, stop and listen to his or her response.

12. No matter what, remember that the most important words are “THANK YOU.”

13. Believe it can be done. People gain deep satisfaction in giving to a worthy cause. BE POSITIVE AND YOU WILL SUCCEED!

Appendix C: _____

PROSPECT TRACKING AND RATING FORM

NAME ADDRESS PHONE NUMBER Other Identifying Data	Latest Gift Year	Amount of the Ask	Who Best to Ask	Next Step	Comments

Miller, Calboun & Company, Inc., 954-493-8958

Appendix D: _____

SAMPLE PLEDGE CARD FOR ANNUAL CAMPAIGNS

2005 Annual Campaign

Yes! I support (charity's name) Annual Campaign with a gift in the amount of \$_____:

- | | |
|----------|-----------------|
| Diamond | \$10,000 + |
| Platinum | \$5,000—\$9,999 |
| Gold | \$2,500—\$4,999 |
| Silver | \$1,000—\$2,499 |
| Bronze | \$100—\$999 |
| Other | \$_____ |

My check in the amount of \$_____ made payable to (charity's name) is enclosed.

Please invoice me in the amount of \$_____ as follows: (check one)

Full amount

Four quarterly payments beginning on _____

12 monthly payments beginning on _____

Please send acknowledgements and updates to me at the address below:

Name: _____

Address: _____

City/State/Zip _____

I prefer email: _____

Signature

Date

Please return to: (charity's name and mailing address. Place web address and any local or state government solicitation requirements)

Thank you!

Appendix E:

SAMPLE PLEDGE FORM FOR CAPITAL CAMPAIGNS

PLEDGE

TO

(Charity's name and address)

I. I, _____, wish to give evidence of my interest in and support of (charity's name) Capital Campaign.

II. I do so in consideration of the ongoing efforts of (charity's name) to solicit funds for (description of use of funds). I recognize that (charity's name) will incur expenses in anticipation of payment of my pledge and will rely on my pledge in seeking commitments and pledges from others.

III. Based upon these considerations and in consideration of the commitments of others, I pledge and agree to pay to (charity's name), the total sum of

\$ _____

payable in cash or negotiable property of equal value, which value shall be mutually agreed to by (charity's name) and me, my successors, heirs or assigns, as the case may be, from time to time hereafter. The overall goal for the use of this pledge or gift is to fund (description of use of funds). However, the funds also may be used, at the discretion of (charity's name), to pay for the expenses incurred by (charity's name) during the campaign to include the repayment of indebtedness.

IV. Payments towards the principal balance of this pledge will be made by me in accordance

with the following schedule; however, I can prepay this pledge at any time:

(Charity's name) will submit to me a statement of the balance due not less than annually at the address set forth below, or at such other address as I may direct in writing.

V. I acknowledge that this pledge constitutes a legal and moral obligation to pay the amounts stated and that (charity's name) is acting and will act in specific reliance upon this pledge commitment.

VI. I authorize (charity's name) to list my name as a contributor in its efforts to secure similar commitments from others. Unless otherwise noted here, my name will be listed as _____.

IN WITNESS THEREOF, I have hereunto set my hand this _____ day of _____ (year).

Signature: _____

Address: _____

The foregoing is hereby accepted and agreed to by (charity's name) by:

Solicitor's name

Position/title

(Place any local or state government solicitation requirements here.)

Thank you!

AFP Code of Ethical Principles and Standards of Professional Practice

STATEMENT OF ETHICAL PRINCIPLES

Adopted 1964; amended October 2004

The Association of Fundraising Professionals (AFP) exists to foster the development and growth of fundraising professionals and the profession, to promote high ethical standards in the fundraising profession and to preserve and enhance philanthropy and volunteerism.

Members of AFP are motivated by an inner drive to improve the quality of life through the causes they serve. They serve the ideal of philanthropy; are committed to the preservation and enhancement of volunteerism; and hold stewardship of these concepts as the overriding principle of their professional life. They recognize their responsibility to ensure that needed resources are vigorously and ethically sought and that the intent of the donor is honestly fulfilled. To these ends, AFP members embrace certain values that they strive to uphold in performing their responsibilities for generating philanthropic support.

AFP members aspire to:

- practice their profession with integrity, honesty, truthfulness and adherence to the absolute obligation to safeguard the public trust;
- act according to the highest standards and visions of their organization, profession and conscience;
- put philanthropic mission above personal gain;
- inspire others through their own sense of dedication and high purpose;
- improve their professional knowledge and skills, so that their performance will better serve others;
- demonstrate concern for the interests and well-being of individuals affected by their actions;
- value the privacy, freedom of choice and interests of all those affected by their actions;
- foster cultural diversity and pluralistic values, and treat all people with dignity and respect;
- affirm, through personal giving, a commitment to philanthropy and its role in society;
- adhere to the spirit as well as the letter of all applicable laws and regulations;
- advocate within their organizations, adherence to all applicable laws and regulations;
- avoid even the appearance of any criminal offense or professional misconduct;
- bring credit to the fundraising profession by their public demeanor;
- encourage colleagues to embrace and practice these ethical principles and standards of professional practice; and
- be aware of the codes of ethics promulgated by other professional organizations that serve philanthropy.

STANDARDS OF PROFESSIONAL PRACTICE

Furthermore, while striving to act according to the above values, AFP members agree to abide by the *AFP Standards of Professional Practice*, which are adopted and incorporated into the *AFP Code of Ethical Principles*. Violation of the *Standards* may subject the member to disciplinary sanctions, including expulsion, as provided in the AFP Ethics Enforcement Procedures.

Professional Obligations

1. Members shall not engage in activities that harm the members' organization, clients, or profession.
2. Members shall not engage in activities that conflict with their fiduciary, ethical, and legal obligations to their organizations and their clients.

3. Members shall effectively disclose all potential and actual conflicts of interest; such disclosure does not preclude or imply ethical impropriety.
4. Members shall not exploit any relationship with a donor, prospect, volunteer, or employee for the benefit of the members or the members' organizations.
5. Members shall comply with all applicable local, state, provincial, and federal civil and criminal laws.
6. Members recognize their individual boundaries of competence and are forthcoming and truthful about their professional experience and qualifications.

Solicitation and Use of Philanthropic Funds

7. Members shall take care to ensure that all solicitation materials are accurate and correctly reflect their organization's mission and use of solicited funds.
8. Members shall take care to ensure that donors receive informed, accurate, and ethical advice about the value and tax implications of contributions.
9. Members shall take care to ensure that contributions are used in accordance with donors' intentions.
10. Members shall take care to ensure proper stewardship of philanthropic contributions, including timely reports on the use and management of such funds.
11. Members shall obtain explicit consent by donors before altering the conditions of contributions.

Presentation of Information

12. Members shall not disclose privileged or confidential information to unauthorized parties.
13. Members shall adhere to the principle that all donor and prospect information created by, or on behalf of, an organization is the property of that organization and shall not be transferred or utilized except on behalf of that organization.
14. Members shall give donors the opportunity to have their names removed from lists that are sold to, rented to, or exchanged with other organizations.
15. Members shall, when stating fundraising results, use accurate and consistent accounting methods that conform to the appropriate guidelines adopted by the American Institute of Certified Public Accountants (AICPA)* for the type of organization involved. (* In countries outside of the United States, comparable authority should be utilized.)

Compensation

16. Members shall not accept compensation that is based on a percentage of contributions; nor shall they accept finder's fees.
17. Members may accept performance-based compensation, such as bonuses, provided such bonuses are in accord with prevailing practices within the members' own organizations, and are not based on a percentage of contributions.
18. Members shall not pay finder's fees, or commissions or percentage compensation based on contributions, and shall take care to discourage their organizations from making such payments.

Amended October 2004



ADDITIONAL RESOURCES

The AFP Bookstore carries many titles dealing with major gifts and related issues. These may be purchased at the AFP website www.afpnet.org/afp_marketplace_and_bookstore.

AFP Code of Ethical Principles and Standards of Professional Practice can be found on the AFP website at www.afpnet.org/ethics.

AFP Fundraising Resource Center—Contact the Resource Center for questions relating to fundraising, philanthropy and nonprofit management. Phone: (800) 688-FIND (3463) or email: resctr@afpnet.org.

You can visit the Online Card Catalog in the Resource Center section of the AFP website and prepare a bibliography on the desired topic.

THE AUTHORS

Peggy Calhoun, ACFRE, began her career in 1978 as executive director of a crisis intervention agency serving three states. As a staff professional, Peggy has worked on campaigns ranging in goals from \$1 million to \$60 million for various causes. Currently, she is senior principal of Miller, Calhoun & Company serving a variety of nonprofits and nongovernmental organizations.

Throughout her 27-year career, Peggy has earned several honors including the Outstanding Fund Raising Executive award given by the Broward Chapter of the National Society of Fund Raising Executives (now AFP) and the Creative Fund Raising Award from the Grantsmanship Center. The Association of Women in Communications honored Peggy as 2001 Women of the Year in Fund Development and Special Events. As faculty for AFP, she conducts workshops and sessions throughout the U.S. for AFP and several nonprofit resource centers.

Richard G. Miller, CFRE, has 38 years experience in philanthropy, having served various nonprofits both as a chief advancement officer and as a consultant. He is currently associate director of the Miami Performing Arts Center Foundation while remaining a principal of the fund development consulting firm he co-founded with Peggy Calhoun.

Rich has managed fundraising programs for Nova Southeastern University, Case Western Reserve University, the University of Miami and the University of the Arts. He was also vice president of C. W. Shaver and Company. Rich is active in professional, civic and cultural organizations locally and nationally. He is vice chairman of the Board of Directors of the Art and Culture Center of Hollywood, Florida, and was president of Eckerd College's Alumni Association.

A Donor Bill of Rights

PHILANTHROPY is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

I.

To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.

II.

To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgement in its stewardship responsibilities.

III.

To have access to the organization's most recent financial statements.

IV.

To be assured their gifts will be used for the purposes for which they were given.

V.

To receive appropriate acknowledgement and recognition.

VI.

To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.

VII.

To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

VIII.

To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.

IX.

To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.

X.

To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

DEVELOPED BY

ASSOCIATION FOR HEALTHCARE PHILANTHROPY (AHP)

ASSOCIATION OF FUNDRAISING PROFESSIONALS (AFP)

COUNCIL FOR ADVANCEMENT AND SUPPORT OF EDUCATION (CASE)

GIVING INSTITUTE: LEADING CONSULTANTS TO NON-PROFITS

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