The Power of “the Ask”

Brought to you by the:

Location: The Daniels Fund
101 Monroe Street
Denver, CO

December 3, 2009

Presented by Joan L. Mason, CFRE
www.masongroup.org

The Mason Group, Inc.
providing counsel for non-profits for over 20 years
Developing a Successful Culture for Philanthropy

- The CEO of the organization must support and be invested in the development process.

- The Board of Directors must give and be willing to “get” resources for the organization.

- There must be a strategic plan in place that everyone supports.

- The internal constituency - faculty, directors, doctors, service providers must be in full support.

- There must be an alignment between development and service delivery.

- The organization must have a brand/image that the public perceives as ethical and full of integrity.

Quoted from a speech by the Chair of the Board of the Association of Fund Raising Professionals, Colette Murray, J.D. CFRE
THE ADIZES LIFE CYCLE

Courtship
Infancy
Go-Go
Adolescence
Prime
Maturity
Aristocracy
Early Bureaucracy
Bureaucracy
Death
Renewal
4-LEGGED STOOL OF FUNDRAISING

DONOR

SOURCE

Current Income
Income & Assets
Assets
Estate Planning

BENEFIT

Ongoing Programs/Services
Special Programs, Projects
Buildings, Equipment, Endowment
Endowment Capital

Unrestricted Annual Capital

Annual Fund
Major Gifts (Program)
Capital Campaign
Planned Giving
THE DEVELOPMENT PROCESS

Linkage

Involvement

Advocacy

Planned gift

Big gift

Major gift

Special gift

Upgraded Donor

Repeat Donor

Donor

Prospect

Linkage

Ability

Interest
Formula for Success

The way you spend time with donors guarantees your outcomes for upgrading them.

Upgrading donors = 65/25/10

10% = Solicitation

25% = Stewardship

65% = Cultivation
The Development Director is the ORCHESTRATOR OF THE PROCESS and must be sure that there is continuity, integrity, stewardship and completion for each Major Gift Prospect. Examples of others who could be involved in the process.

Recruitment Process - Could be a volunteer, program person or development staff.
Romance - This is a Mission Delivery stage and can be extended by a "service delivery staff".
Request - The volunteer/staff solicitation Team that has received training should be involved here.
Recognize - The Development Department must conduct this stage.
# Return on Investment in Fund Raising Methods

Conducted by Center on Philanthropy

**Sampling:** 127,000 non-profits contacted

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<th>Category</th>
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<td>Workplace Giving</td>
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Board/Staff Teams for Effective Fund Raising

Staff depend on their Board for:

• Time and energy to do work
• Belief in mission
• Influence
• Knowledge of prospective donors
• Giving
• Asking for gifts
• Pride in accomplishments
Board/Staff Teams for Effective Fund Raising

Boards depend on their Staff for:

- Expertise, Experience
- Knowledge of Volunteer Management
- Knowledge of Community
- Professionalism
- Ethical Behavior
- Sensitivity to Board Members’ Needs
Making the Case in a Solicitation

1. State the need.

2. Document the need you are meeting.

3. Propose strategies and tasks.

4. Identify who will benefit.

5. Demonstrate organizational competency.

6. Specify the resources required.

7. State how gifts can be made.

8. Communicate the benefits for making a gift.
Exercise in Preparing and Making a Case

Case Study: You are at a reception and suddenly are face-to-face with a major prospect. You are surprised but pleased that this prospect is at the event, as you’ve been planning for months on how to make the first contact. She asks some vague but genuinely interested questions, including, “So, what’s new and exciting at your organization?” What you say reflects an undergirding set of beliefs about your organization. Plan a short, three-minute response that you can use in your role as an ambassador for your organization and which you can model to other staff and volunteer ambassadors.

To prepare, think about your organization in the following dimensions:

• The unique benefits the organization provides the community.

• What, at this point, is especially exciting, cutting edge, or promising.

• Connections to traditions and organizational accomplishments of the past.

• The compelling nature of the current organizational goals and initiatives.

• The unique opportunities facing the organization at this point in time. Consider a potential intersection of preparation and opportunity to fill a need.

• Create a question to draw the prospect into involvement in the ideas you’re discussing.

Take fifteen minutes to prepare this response. You will practice delivering it to the course participants at your table, and they will be asked to give you constructive feedback on what worked well and how your presentation can be improved.
The Power of the Ask
Volunteer and Staff together

Note: The volunteer comes to the table with their passion about the organization and the staff comes to the solicitation with the knowledge they have of the organization and their passion – making an unbeatable combination!

Participants in the major gift solicitation:

#1 Leadership Volunteer
For the past three years, you have chaired the board of Directors and are passionate about the organization’s mission. You know the prospective donor relatively well; are in Rotary together and occasionally play golf with them. Your children go to school together. You are an upper level manager directing marketing for a computer-service company and make a salary of $120,000 per year. Your firm has a matching gift program. You are currently a donor for $1,000 per year.

#2 Development Director
You have served the organization in development for 5 years and are recognized as a leader in your field. You are inspired by the work of your organization and are passionate about it. You contribute $500 annually to the organization and your salary is $48,000 per year. You know the prospective donor and have met them through functions you hold for major donor prospects. You direct the Annual Fund at the organization and are beginning the Planned Giving Program.

#3 Prospective Donor
You have been engaged appropriately by this organization and have had personal visits from both volunteers and staff – but not recently. You go to the Annual Meeting and give annually. You are an investment manager and have given pro bono advice for their planned giving program. You have made seven or eight gifts to the organization over a ten-year period of time ranging from $750 up to $2,500. You are self-employed as a consultant and your average gross income per year is $185,000. You have young children and know the Leadership Volunteer. You have heard rumors about the organization launching a campaign but don’t know the details.
Volunteers Single Most Common Fear about Solicitation
(resource: Board Source)

- NOT that they will be turned down!
- NOT that they are the wrong person to ask
- NOT that the prospect will be “turned off” by solicitation!
- NOT that they will have to give in order to ask!
- THE SINGLE MOST COMMON FEAR is that they do not know precisely what the organization does and what they are asking the prospective donor to fund!