

Roosevelt for Generation Capital Campaign

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- Wisdoms gained after 31 years of fundraising – including both great success and some misfires along the way:
 - Don't take the rejections personally. It's not about you. You fail 100% of the time if you don't ask
 - It is OK to feel uncomfortable when making the ask.
 - Show 3 E's- Energy, Enthusiasm, Empathy. Be sincere, genuine and with a message that is heartfelt.
- Volunteer role: get an appointment with a prospective donor (natural partner), pursue their interest in the project, and make an ask.
 - Help them imagine the possibilities
 - It's not just a gift—it's an investment
 - Articulate what their return on investment will be—what's in it for them?
 - Capitalize on current momentum – make appointments now, strike while the iron is hot!
- How to schedule the appointment:
 - Avoid use of the word "visit". Use "meeting" instead —it connotes importance.
 - Text first: Since most friends prefer texts use that method as step 1. Ask them for a time you can call them to discuss an important project you think they will be interested in.
 - Phone call second: Call at the assigned time to set up the "meeting"
 - Meeting third: Don't meet in a crowded place where you can be distracted.
- Characteristics of enlightened givers:
 - They are sophisticated and savvy about fundraising. If they accept the meeting, they know you're going to ask for a gift. **DON'T DISAPPOINT.**
 - When you say you're in the quiet phase of a campaign, they know you're going to be asking for a sizeable gift.
 - They know you are a **VOLUNTEER** who has a passion for this campaign. They will respect that. If they forget, you can remind them 😊
 - They recognize early gifts are important—emphasize that point. There are only a few people who have the capacity and interest to make this campaign a success. It is your hope that they are one of them.
 - Remember:
 - Prospects are rarely, if ever, offended when asked for a major gift. As a matter of fact, you flatter them. Better to ask too much rather than too little.
 - Important early gifts inspire others to give. Everyone wants to be part of a winning team!
- Why donors give:
 - Belief in the mission and vision of the organization

- Financial stability of organization
- Want to leave a legacy— name will live on at TRHS
- Regard for and trust in person making the ask—people give to people
- Making the ask:
 - You must have objective for every meeting
 - Identify the best case outcome you want to achieve
 - Identify the least acceptable outcome.
 - Early in the visit
 - Must put people completely at ease
 - First couple of minutes are the most important
 - Must ask probing questions to learn and get their attention (open questions)
 - Confirm why you are together for this meeting.
 - Today I'm not going to ask you for a gift.
 - Instead, I want to tell you about this project and get your feedback.
 - Then I want to come back and ask you for a very *meaningful* gift
 - Being clear at the on-set that you are not going to ask for money on this visit overcomes immense emotional hurdles.
 - Proceed to tell about the project and ask probing questions along the way.
 - When it's time to ask for the next meeting, they may not want to meet again. They may be ready to make a commitment and will ask how much is wanted from them.
 - Response option: "I'm not smart enough to know what to ask you for, but I can tell you this—the project costs 1 million+, we have \$500,000 committed and we'd like 5 more gifts of \$100,000 each, plus many more smaller gifts.
 - "Can we discuss the IMPACT you would like to have with your gift? It is my hope that you would be interested in giving \$100,000."
 - THEN LET SILENCE LAY
- The "magic" of the ask - stress cause and urgency
 - Convey the benefits the donor will receive – do not simply discuss the benefits to TRHS and the students served.
 - Discuss the joy the gift will bring the donor.
 - Discuss the impact the donor can make
 - Sell the "return on investment" rather than selling the institution
 - Emphasize the relevancy and urgency and how the donor can make a difference.
 - ALWAYS ASK FOR A SPECIFIC AMOUNT - NO RANGES (Offering a range makes you realize that you don't know much about the donor.)
 - Be careful to not make the size of the gift the centerpiece of the discussion.
 - Remember to have fun—don't leave your sense of humor at home
- Don't be afraid of failure
 - You will fail 100 percent of the time if you do not ask

- You *must* ask for the gift – and the specific amount
 - If they say no it is not usually because of you. It is their loss.
 - If you are not getting rejections it is probably true that you are not getting many gifts either.
- Overcoming objections
 - Do not bring up objections you anticipate.
 - Objections can be a plea for more information or a way prospects mask their concerns.
 - Listen, probe, show empathy.
 - “I struggled with this, as well... but found that the positives outweighed the negatives.”
 - “I am committed to making the Roosevelt experience the best it can be for our students.”
 - Pivot
- Dealing with preemptive pledges/gifts that don’t match your vision
 - Express gratitude.
 - Do not act disappointed.
 - Response options after expressing gratitude:
 - “May I tell you the amount we were hoping you would consider?”
Hopefully this will open the door for continued discussion. (This approach reminds them of the importance of a leadership gift from someone who has the interest and capacity.)
 - “Would you be open to visiting again at a later date after some additional donations are committed and progress made?” (This allows revisiting the possibility of an increased gift amount.)
- Next steps
 - Always end the meeting discussing next steps