



United Way of Greater St. Louis


STRATEGIC TRANSITION PLANNING SERIES

2018-2019

2.8.19



Helping people.



United Way
of Greater St. Louis

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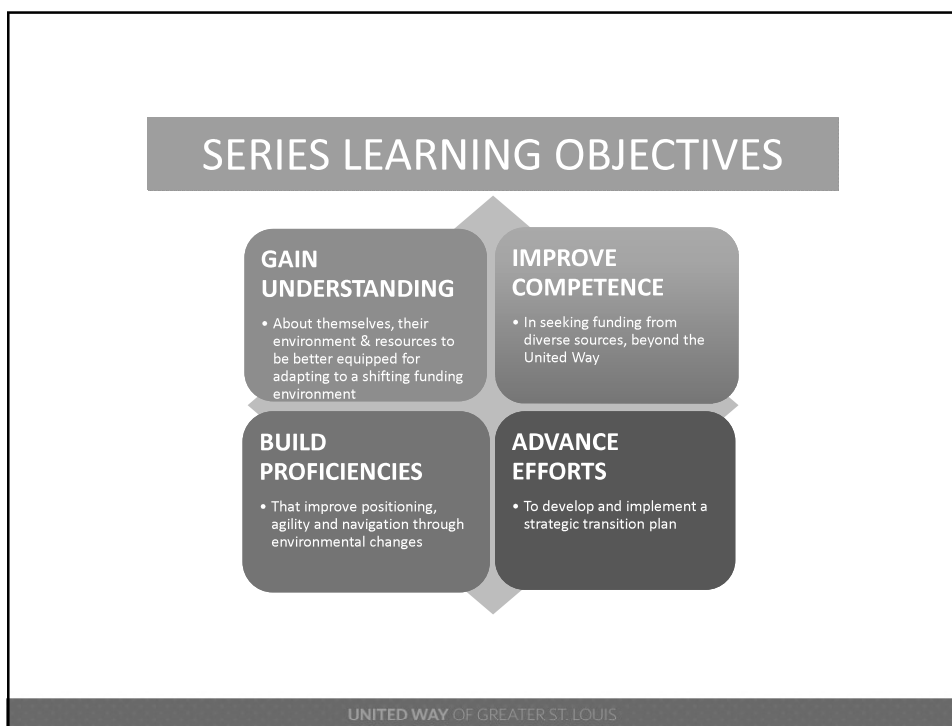
TRANSITION SERIES GOAL



Help member agencies gain competence in: navigating through environmental changes, better securing diverse & sustainable funding streams, and exploring/pursuing options, all of which enhance the fulfillment of community needs-based missions

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RACIAL EQUITY LENS CONTEXT

The cartoon illustrates the progression from Equality to Liberation. In the first panel, labeled 'EQUALITY', three people of different heights (tall, medium, short) are standing on the ground, trying to see over a fence. The shortest person cannot see. In the second panel, labeled 'EQUITY', the tallest person has moved their box to the side, so the medium person can see. The shortest person still cannot see. In the third panel, labeled 'REALITY', the tallest person has moved their box to the side, so the medium person can see. The shortest person still cannot see. In the fourth panel, labeled 'Liberation', the tallest person has moved their box to the side, so the medium person can see. The shortest person still cannot see.

- Different communities (and individuals within communities) situated differently relative to each other
- Differences due to many factors, including history, education, language, access to community assets...
- While intent of policies & programs is to create access for all people (lifting all boats), in practice, universal policies create access to opportunity differently
- A rising tide brings less benefit or possibly hazard if one's boat is leaky or if one does not have a boat.
- Series sessions will provide an opportunity to apply a racial equity lens to topics in hopes of getting all members in our community a boat that floats so that all boats can be lifted.

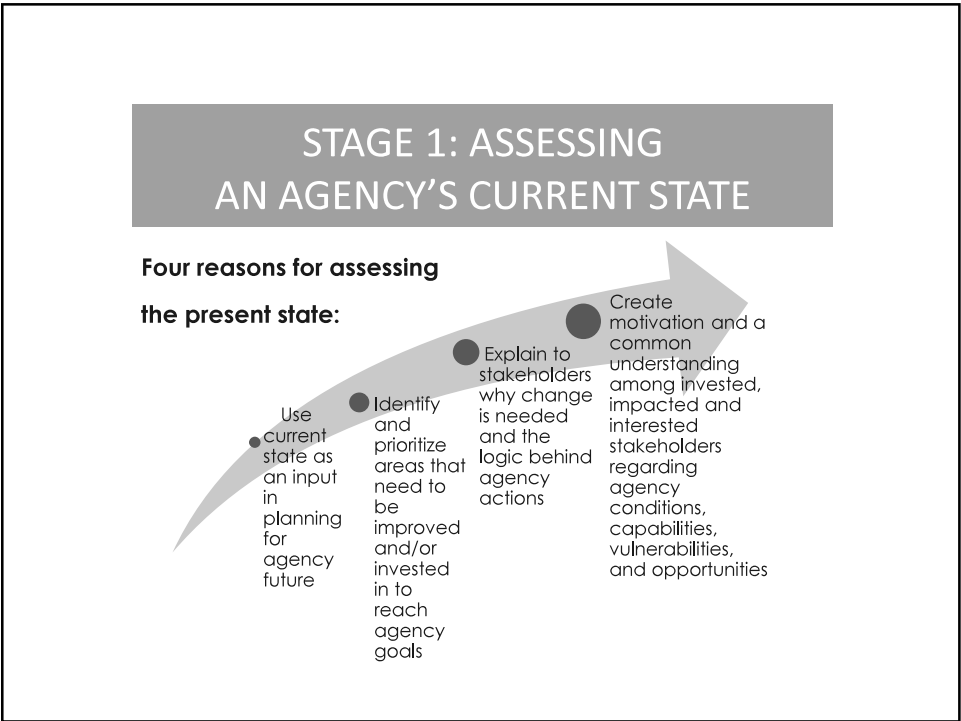
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Member Agency Strategic Transition Planning Series				
Stages progressively build toward culmination of helping agencies formulate a viable plan for better positioning in the current changing funding environment				
Stages:	Assessing an Agency's Current Position	Creating Vision & Setting Strategic Direction	Exploring Resources	Operationalizing the Plan
Intent:	Identifies/refines critical factors that outline agency overall environmental standing, affects current success & future viability. Informs decision-making in subsequent stages	Builds understanding and approaches to change management and consider possibilities, aligned with agency position, to shape future vision & strategic direction	Uncovers resources to be utilized to leverage agency's position amidst change and augment its ability to plan for reaching vision	Aligns vision, priorities & agency position with resources to develop a strategic workplan, outlining actions helping agency better adapt to changing landscape
Sessions:	#1. Series Overview & SWOT #2. Financial Health #3. Fund Devp Tools/Techniques #4. Prgm Financial Sustainability #5. Contingency Planning	#6. Change Management #7. Innovation #8. Vision/Strategic Direction	#9. Board Engagement & Role in Fund Devp #10. Dive into Fund Development #11. Strategic Alliances - P1 #12. Strategic Alliances - P2	#13. Creating an Actionable Transition Plan
Learning Objectives:	Participants will improve understanding about agency condition, including capabilities & vulnerabilities overall and in finance & fund development areas	Participants will shape their agency's future vision, leveraging position, in context of change, utilizing innovation, all to pursue improved mission fulfillment	Participants will identify resources (focusing on revenue generation & program/operational effectiveness) to help further mission fulfillment	Participants will utilize understanding & insight gained to frame strategic transition plan, better positioning agencies in the shifting environment
Correlating Quality Standards:	D: Board drives direction P: Effective program design G: Board financial oversight F: Financial stability P: Financial planning/oversight	G: Board drives direction G: Program effectiveness P: Program positive impact G: Community accountability A: Structure facilitates operations	G: Board meets strategic needs F: Financial stability P: Effective financial planning G: Board accountable to community	G: Board drives direction F: Financial stability P: Program positive impact G: Board accountable to community

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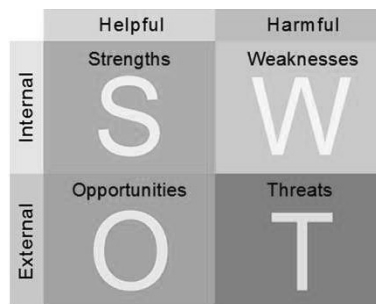
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SESSION 1: SWOT Analysis

5.17.18

Presented by: Rebecca Bennett
Emerging Wisdom

- Grounds plan
- Provides realistic view of agency's capabilities and vulnerabilities
- Identifies internal strengths and weaknesses
- Examines external opportunities and threats



© 2018 Rebecca Bennett, Emerging Wisdom

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SESSION 2: Financial Health

6.14.18

Presenters: Judy Murphy & Amy Altholz
RubinBrown

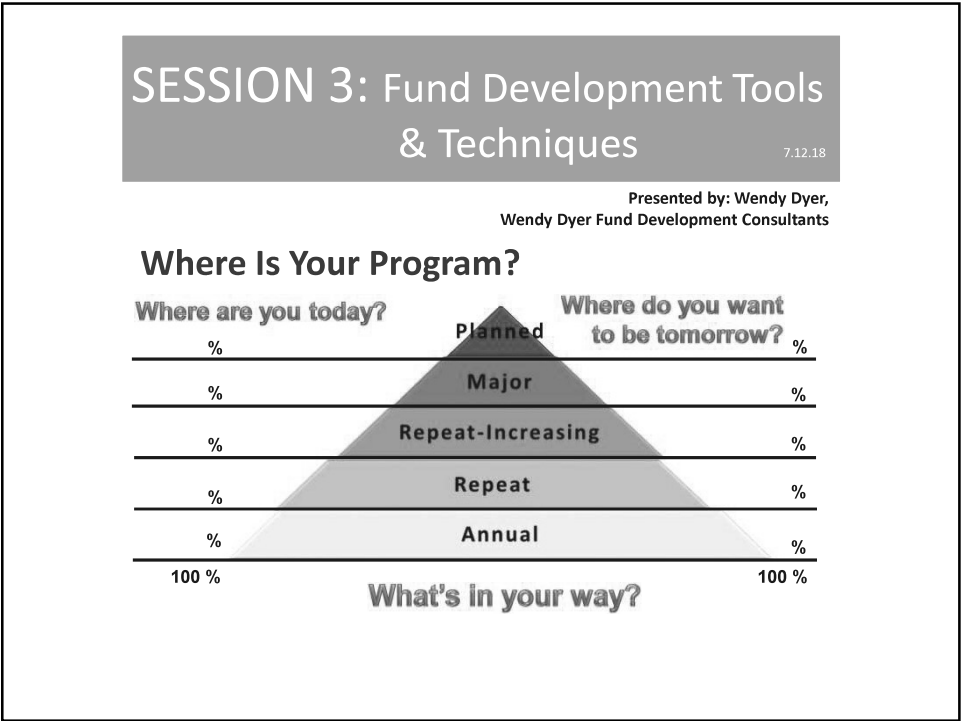
Common financial sustainability benchmarks include:

- Operating reserves
- Liquidity evaluation
 - Days of Cash on Hand to Pay Expenses
 - Current Liquid Assets/Current Liabilities
- Funding gap analysis
- Diversified funding streams
- Budget vs. actual analysis



 RubinBrown

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SESSION 5: Contingency Planning

10.11.18

Presented by: Pat Knoerle-Jordan
Experience on Demand

Definition: Risk mitigation process preparing an agency for potential challenges by navigating through worst-case scenarios to help ready itself for best responses if needed

Contingency Planning is used to:

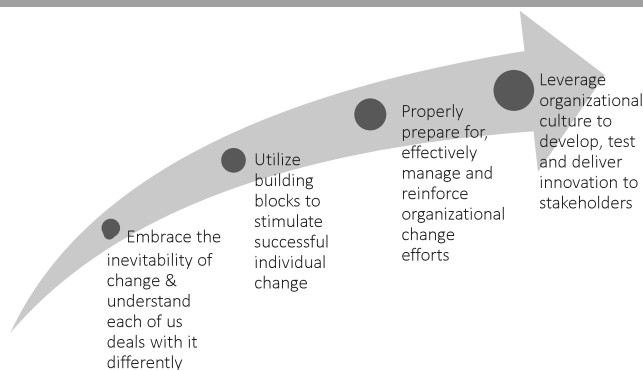
- Achieve higher degree of shared experience and organizational learning
- Raise/challenge widely held beliefs & assumptions about agency and its direction
- Identify key levers to influence future course; incorporate change management into strategic analysis; & intentionally mitigate future negative impacts

Contingency Planning Model:

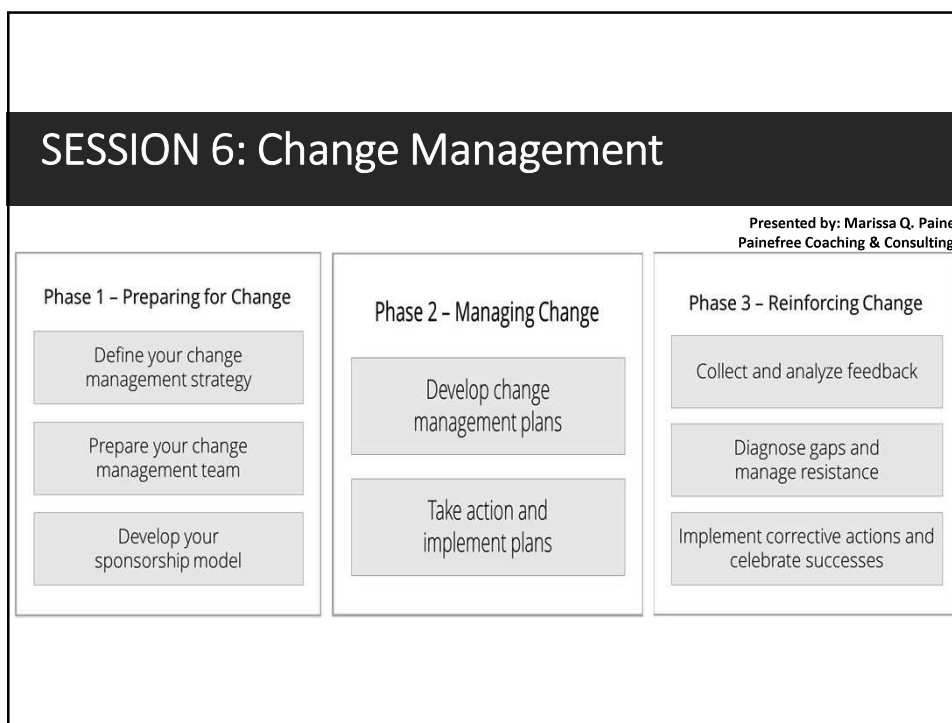


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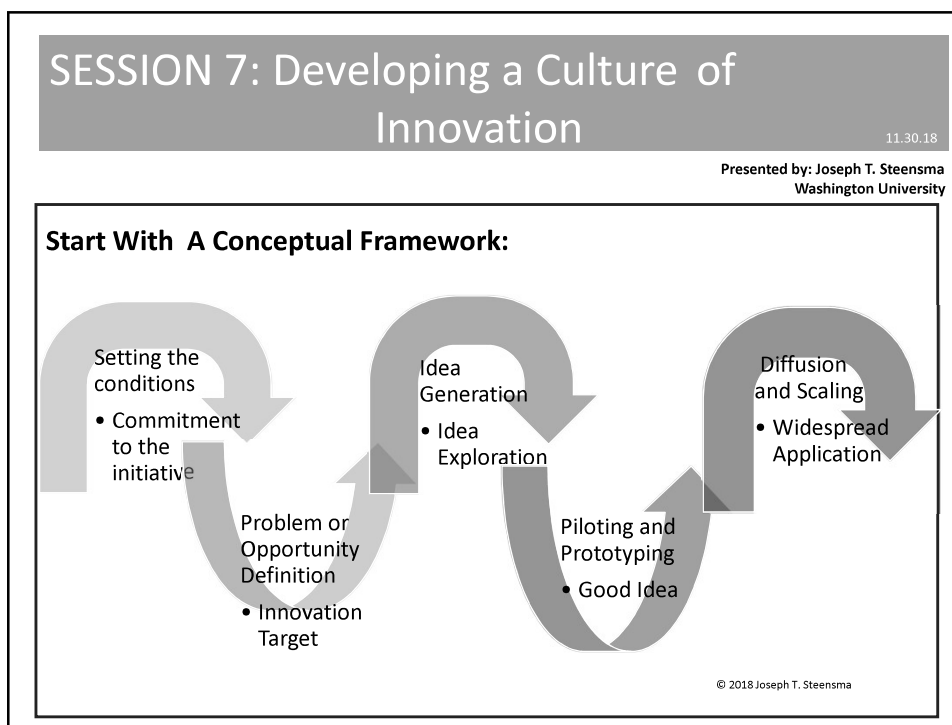
STAGE #2: PREPARING FOR CHANGE AND INNOVATION



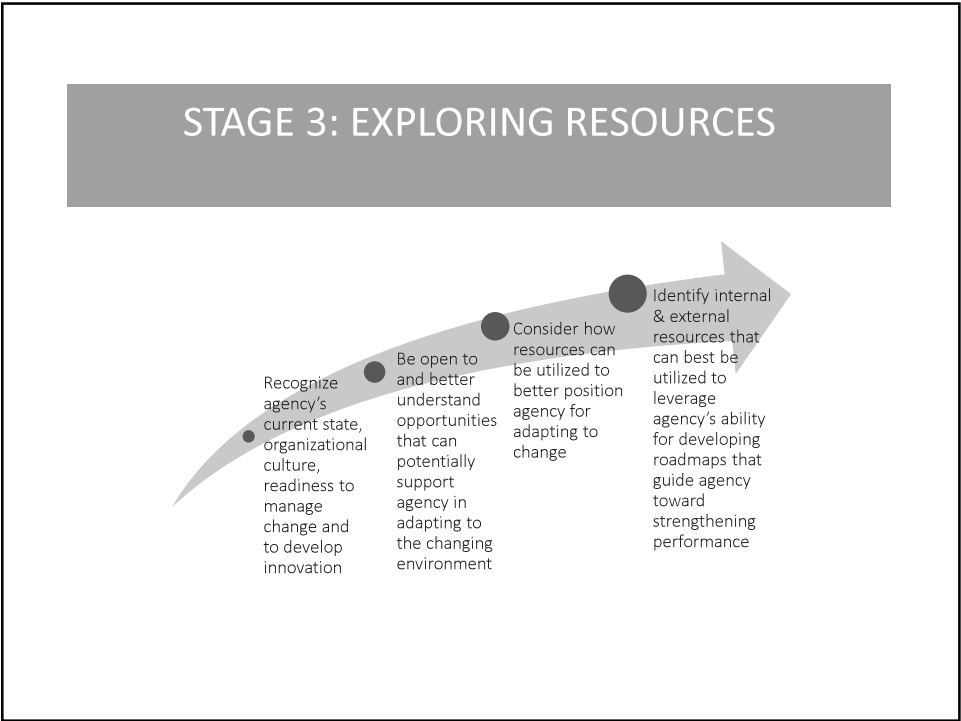
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SESSION 8: Applying a Racial Equity Lens – Exploring Ways to Advance Equity

Presented by: Kira Hudson Banks, PhD

A PATH TO RACIAL EQUITY

	Awareness of Inequity	Understanding of Why Inequity Exists	Transforming Towards Equity
Regional			
Institutional			
Individual			

	Awareness	Understanding	Transforming
Working On	Awareness Education "Lifting the veil"	Uncomfortable; • Learnings • Explorations • Considerations History	Focus on data and outcomes New and intentional • Habits • Policies • Choices • Behavior
Common Language	Diversity, inclusion, Tolerance, Cultural competency, Race as a social construct	Institutional racism, Intersectionality, Internalized oppression, Internalized superiority	Disaggregated data, Racial Equity Lens, Structural Racism, Equity-driven strategy, Liberation

STC FORWARD THROUGH FERGUSON

TOWARD EQUITY

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SERIES ROLES & RULES

Roles

Facilitators

- Guides learning and sharing
- Conducts exercises
- Maintains schedule

Participants

- Are open to learning
- Share knowledge & insight
- Check for understanding

Rules

- Manage your comfort
- Listen actively
- Ask questions and encourage others to share
- Minimize distractions
- Respect all views and opinions
- Enjoy yourself!

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Member Agency Strategic Transition Planning Series

Please contact Julie Simon at
Julie.simon@stl.unitedway.org
with questions, comments or concerns

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United Way of Greater St. Louis
STRATEGIC TRANSITION PLANNING SERIES
Session #9: Board Engagement in
Fund Development
February 8, 2019



Helping people.



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SESSION PURPOSE


- Better equips agencies to fully engage Board members for becoming more effective fundraisers
- Outlines infrastructure that best supports Board members in their fundraising role
- Insights on developing/delivering (refining) messages that maximize fundraising success



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LEARNING OBJECTIVES



Participants will:

- Advance learning about the infrastructure needed to support the Board's role in fundraising
- Gain understanding about Board roles & responsibilities to develop and maintain financial resources
- Improve knowledge about strategies that will help Board members be more engaged and effective in fundraising
- Create Impact Statements & other messaging tools and explore ways to maximize messaging
- Enhance ability to overcome the fear of asking for gifts by getting comfortable with 10 seconds of courage

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United Way
Strategic Transition Planning Series

Board Engagement in Fund Development

February 8, 2019

Part 1

“They can because they think they can”

Virgil

Pete Werner
Nonprofit Consultant

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Agenda

- I. Introduction
- II. Roles & Responsibilities of the Board in Fundraising
 - Fundraising as an Individual Board Member
 - Fundraising Collectively as a Board
- III. Barriers to Effective Board Fundraising
- IV. Strategies and Solutions
- V. Conclusion

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Introduction

Time, Talent and Treasure
Work, Wisdom and Wealth

"Nobody made a greater mistake than he who did nothing because he could only do a little."

Edmund Burke

"Eighty percent of success is showing up."

Woody Allen

"Do your best and forget the rest."

Tony Horton – P90X

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Introduction

CHECKLIST

of Board Roles and Responsibilities

Basic board roles and responsibilities are the foundation for a successful board. BoardSource has designed this checklist to help you quickly remind yourself of your key responsibilities. It's also a great board orientation tool. Can you check all the boxes?

1. ESTABLISHING IDENTITY AND DIRECTION

- Does the board adopt and review a strategic plan or defined a strategic direction for the organization within the past three years?
- Does the board ensure that the organization's mission, vision, and values are reflected in the organization's programs?
- Are the organization's strategic priorities adequately reflected in the annual budget?

2. ENSURING THE NECESSARY RESOURCES

- Does the board adopt policies related to fundraising to be pursued either on behalf of or in support of the mission?
- Does the board expect all its members to be active participants in fundraising efforts?
- Does the board's composition reflect the strategic needs of the organization?
- Is the board confident that the chief executive's skills and other qualities represents a good match for the organization's strategic needs?
- Does the board seek and review information related to the organization's reputation?

3. PROVIDING OVERSIGHT

- Does the board contract with an outside auditor for the annual audit?
- Does the organization have up-to-date risk management policies and plans?
- Does the board monitor progress toward achievement of goals related to the organization's programs?
- Does the board have a clear understanding of the organization's financial health?
- Does the chief executive make an annual performance review by the board?
- Are all board members familiar with the chief executive's compensation package?

4. BOARD OPERATIONS

- Does the board regularly assess its own performance?
- Are organizational and board policies regularly reviewed?
- Do governance and risk factors actively engage board members in the work of the board?
- Do the board members have the board's attention on issues of strategic importance?
- Do board members have easy access to information needed for effective decision making?

Source: National Board Fundraising Study

BOARDSOURCE

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Introduction

Do CEOs think their boards are good at fundraising? Are board members comfortable with fundraising?

The charts illustrate board effectiveness and fundraising comfort levels. The top-left chart shows board effectiveness across various areas, with Mission at 84% and Fundraising at 16%. The bottom-left chart shows fundraising effectiveness by revenue size, with Over \$10 million at 35%. The two right-side charts show board member comfort levels for fundraising activities, with 'Sign Letters' being the most comfortable (45%) and 'Ask for Money Directly' being the least comfortable (19%).

Area	Percentage
Mission	84%
Financial Oversight	79%
Ethical Oversight	72%
CEO Support	69%
CEO Evaluation	68%
Monitor Performance	61%
Strategy	55%
Recruitment	39%
Community Relations	32%
Fundraising	16%

Revenue Size	Sufficient	Very Sufficient
Under \$1 million	18%	2%
Between \$1-5 million	22%	2%
Between \$5-10 million	17%	2%
Over \$10 million	35%	7%

Activity	Very Uncomfortable	Uncomfortable	Comfortable	Very Comfortable
Ask for Money Directly	19%	38%	32%	12%
Call Potential Donors	20%	39%	32%	8%
Meet Donors in Person	30%	47%	19%	5%
Provide Names for Calls	33%	46%	15%	6%
Sign Letters	10%	45%	42%	4%

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Roles & Responsibilities of the Board in Fundraising

Board members engage in fundraising:

1. As individuals
2. Collectively - part of the governance function

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Fundraising as an Individual Board Member

1. Make an annual personal gift
2. Support special events
3. Find new donors
 - And steward current ones
4. Be an ambassador

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Fundraising as an Individual Board Member

1. Make a personal gift

- Make an annual gift
- Be personally generous

2. Support special events

- Attendance alone is usually not enough
- Bring people
 - ❖ Bring the “right” people
- Solicit sponsorships
- Engage in ancillary fundraising aspects

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Fundraising as an Individual Board Member

3. Find new donors

- Open up your contact list
 - ❖ And give guidance
- Talk to your contacts
- Make introductions
 - ❖ Tours, coffee with the CEO, DOD
 - ❖ Friendraisers in your home
- Participate in cultivation & solicitation meetings
- Make an ask

Steward current donors

- Your contacts
- Other donors

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Fundraising as an Individual Board Member

4. Be an ambassador

- Champion the agency throughout the community
 - ❖ Professional circles
 - ❖ Social circles
 - ❖ Any area of influence
 - ❖ Be an evangelist/advocate
 - ❖ Be authentic
 - ❖ Know your audience
 - ❖ Know your message

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Fundraising as an Individual Board Member

1. Make a personal gift
2. Support special events
3. Find donors
4. Be an ambassador

You should be involved in all four areas

Engagement and effectiveness will vary

Build a culture of philanthropy

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Fundraising as an Individual Board Member

Culture of philanthropy

Most people in the organization act as ambassadors and engage in relationship building. Everyone promotes donating and can articulate a case for giving. Fundraising is viewed and valued as a mission-aligned program of the agency. Organizational systems are established to support donors. The ED is committed and personally involved in fundraising efforts.

Kay Spinkel Grace
Under Developed – CompassPoint

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Fundraising Collectively as a Board

1. Be strategic and intentional
2. Have staff capacity to support fundraising
3. Align board with fundraising priorities
4. Create a development plan
5. Have a strong development committee

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Fundraising Collectively as a Board

1. Be strategic and intentional

➤ Ways for nonprofits to raise money

- ❖ Individual gifts
- ❖ Special events
- ❖ Grants (foundations)
- ❖ Corporate gifts

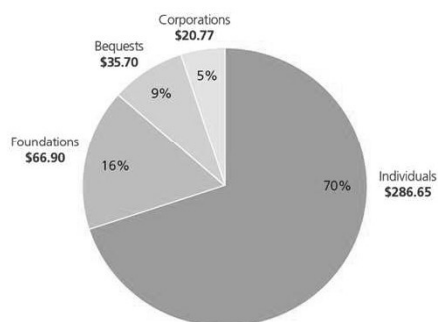
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Fundraising Collectively as a Board

1. Be strategic and intentional

2017 contributions: \$410.02 billion by source (in billions of dollars)



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THINKING STRATEGICALLY ABOUT RAISING MONEY

Small Group Exercise

Exercise #1:

Your Agency's Charitable Giving Breakdown
CURRENT PERCENTAGES



Your Agency's Charitable Giving Breakdown
OPTIMAL PERCENTAGES



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Fundraising Collectively as a Board

1. Be strategic and intentional

- What does your pie look like now?
- What should it look like?
- What does the staff and board pies look like?
- Where are there opportunities?
- What is your ROI in each giving area?
- Sometimes sacred cows make the best hamburgers

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Fundraising Collectively as a Board

2. Have staff capacity to support fundraising

- Support a development team commensurate with budget and fundraising requirements
 - ❖ Director of development
 - ❖ Grant writer
 - ❖ Special event coordinator
 - ❖ Admin/database support
 - ❖ Marketing and communication support
 - ❖ Volunteer coordinator

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Fundraising Collectively as a Board

3. Align board with fundraising priorities

- Identification of experience, skills and attributes
- Recruit the right board members
- Create a strong recruitment process
- Have the right size
- Demographic opportunities and challenges

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Fundraising Collectively as a Board

Small Group Exercise #2

Agencies are well aware of the importance of having a diverse board across a spectrum of demographics. Diversity in gender, age, skill sets and client representation are often high priorities for boards.

Given United Way's intent to apply a racial equity lens to its Transition Series session, let's drill down on one aspect of diversity:

Some agencies have found developing/maintaining a board that is both racially representative of the community it serves and that possesses the necessary fundraising capacity, particularly vexing.

1. Do you agree with the above supposition? If not, why?
2. Is it an important issue for your agency?
3. When looking for new board prospects, do you look first at skill sets, particularly fundraising, or demographic goals?
4. What tactics have you found successful in attracting people of color that improve your Board's ability to raise funds?
5. How racially diverse is your board?
6. Grade your board's effectiveness in fundraising (A – F)

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Fundraising Collectively as a Board

4. Create a development plan

"A fool with a plan can outsmart a genius with no plan any day."

T Boone Pickens

- Get a plan
- Work the plan

"Everybody has a plan until they get punched in the face."

Mike Tyson

- Don't be afraid to adapt but be strategic and intentional

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Fundraising Collectively as a Board

4. Development plan (cont.)

- Board input and buy-in are critical
- Should have clear **what, when** and **who**
- It is **not** the staff's plan
- It is **not** just the Committee's job

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Fundraising Collectively as a Board

5. Have a strong Development Committee

- Leads by example
- Helps drive the development plan
- Involves high level strategizing and hands-on activities
- **Is not the special events committee**

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Fundraising Collectively as a Board

1. Be strategic and intentional
2. Align board with fundraising priorities
3. Have staff capacity to support fundraising
4. Create a development plan
5. Have a strong development committee

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Barriers to Effective Board Fundraising

- Lack of:
 - Desire
 - Passion
 - Direction
 - Commitment
 - The basic tools
 - Knowledge
 - Confidence
 - Engagement
 - Accountability
 - Staff support

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Barriers to Effective Board Fundraising

- Slaying a two-headed monster
 - Dilemma: how do you:
 - ❖ Recruit and onboard new board members who are effective and committed fundraisers
 - Some prospects might shy away due to fundraising expectations
 - ❖ At the same time energize and rejuvenate current board members who have not been fully engaged
 - Some current board members may elect not to stay given the re-commitment to fundraising

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Solutions and Strategies

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Solutions and Strategies

• Perform a self-assessment regarding the agency's need and appetite for increasing its fundraising efforts

- Why does the agency need/want the board to engage more in raising money?
 - ❖ Make payroll
 - ❖ Expand program
 - ❖ Increase reserves
 - ❖ Other
- Is there a solid core of Board and staff that believe the agency should and can increase its fundraising efforts?
 - ❖ Not all board members may agree but key members should
 - ❖ All staff should be committed
 - ❖ This is where you might (and maybe should) lose some members
- What is your board like now?

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Fundraising Collectively as a Board

Culture of philanthropy

Most people in the organization act as ambassadors and engage in relationship building. Everyone promotes donating and can articulate a case for giving. Fundraising is viewed and valued as a mission aligned program of the agency. Organizational systems are established to support donors. The ED is committed and personally involved in fundraising efforts.

Kay Spinkel Grace
Under Developed – CompassPoint

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Solutions and Strategies

Exercise #3

What is the current status of your board?

1. Everyone is committed to and effective in fundraising
 - ❖ Then what are you doing here?
2. A core group are strong fundraisers in most phases but most members are inconsistent
 - ❖ The same people are on the development committee and leading fundraising efforts
3. All are involved in aspects of fundraising, but none are "all in"
 - ❖ Engaged in some part(s) but completely absent in others
4. Most/all are donors and support special events but that's it
 - ❖ Little interest in resource development committee, being an ambassador, opening doors, etc.
5. Most/all do not want to be involved in fundraising
 - ❖ Blow it up
6. Other

If your agency is not in the #1 category:

- Are you satisfied with where you are?
- What are the 3 main barriers in getting to the first category?
- What are 3 things you think you should do to get yourself there?

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Solutions and Strategies

- Board engagement in fundraising starts with recruitment
 - Is the agency clearly stating its expectations?
 - Is the agency asking the prospect about her/his expectations?
 - Is the agency being consistent in the expectation conversations?
 - Does the agency have ideas for a committee or project assignment?
 - Are you recruiting people who have a passion for your mission?

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Solutions and Strategies

- Are you recruiting people who have a passion for your mission?
 - 3 important elements to board fundraising success
 1. Capacity (affluence, access, influence)
 2. Philanthropic
 3. Love what the agency does
 - Do they at least have the potential to love what you do?

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Solutions and Strategies

- Do you have a strong orientation/onboarding process?
- Do you have an engagement plan for each board member?
 - Board members engage at different times and for different reasons
 - Similar to major gift donor plan
 - Committees, projects, panels, conferences, kitchen cabinet, tours, interaction with clients, regular coffees with CEO

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Solutions and Strategies

- Do board members have a firm understanding of the organization's programs?
 - Strong program knowledge helps members identify contacts in their networks that may connect with the mission
 - Helps board members tell the story
 - Don't assume they do
 - Are program committee reports robust and informative?
 - Does program staff present at board meetings?

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Solutions and Strategies

- Have a strong board appeal
 - Be strategic regarding timing
 - Discuss at a board meeting
 - Use letter with a compelling ask and stretch goal coming from board chair and development committee chair
 - 100% participation non-negotiable
 - Encourage leadership giving
 - Make customized asks
 - Consolidate time period
 - Follow-up phone calls from board chair/DC chair to "late" members
 - Report out results

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Solutions and Strategies

- Are board members effective at telling the agency's story?
 - Have each board member create a personal case for support
 - ❖ Need
 - ❖ Outcomes
 - ❖ Stories
 - ❖ In their own voice (BE AUTHENTIC)
 - Practice – role play in small groups as part of a board retreat

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Solutions and Strategies

- Have each board member build a personal development plan
 - Personal gift
 - Special events
 - New donors/prospects
 - Prospect strategizing
 - Current donors
 - Friend-raisers
 - Throw a birthday party to benefit the agency
- Update annually
- Part of a board retreat
- Part of annual conversation with CEO and board chair

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Solutions and Strategies

- Encourage board members to be intentional and strategic in fundraising
 - It takes time to cultivate a prospect
 - It's about relationships
 - Asking questions is important
 - Relationships are built through trust
 - It's about the donor
 - Work with staff
 - Work the plan

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Solutions and Strategies

- Invite board members to major gift donor meetings
 - Not solicitation calls
 - Stewardship meeting with established donors
 - Check with the donor first
 - Board member can share her/his story
 - Donor's enthusiasm will motivate the board member
 - Not right for every donor or every board member

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Solutions and Strategies

- Is your board chair “on board”?
 - The most important leader and cheerleader
 - Resource development committee chair cannot be the only voice in the room
 - Along with CEO and DoD, RDC and Chair create robust discussion
 - Willing to meet with over and under-achievers
 - Leads by example
 - ❖ Leadership annual gift
 - ❖ At all special event
 - ❖ Ambassador-in-chief

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Solutions and Strategies

- Are you monitoring execution and results?
 - Report out on implementing your development plan at every board meeting
 - Celebrate successes – model for other folks – give details
 - Have a dashboard to track leading indicators
 - ❖ Board driven tours
 - ❖ Board driven CEO coffees/lunches
 - ❖ Increased annual gifts or leadership gifts
 - ❖ Board driven special event corporate sponsorships
 - ❖ Board driven asks

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Solutions and Strategies

- Is the staff committed to supporting the Board's efforts in fundraising?
 - Put Board members in a position to be successful
 - Provide information, history, background, etc.
 - Identify action items for Board members to perform
 - Be accessible
 - Prompt, cajole, ask, ask again
 - Follow-up
 - Celebrate successes
 - Meet one on one
 - CEO should be a leadership giver
 - Everyone on staff is a fundraiser

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Board Engagement in Fundraising In Closing

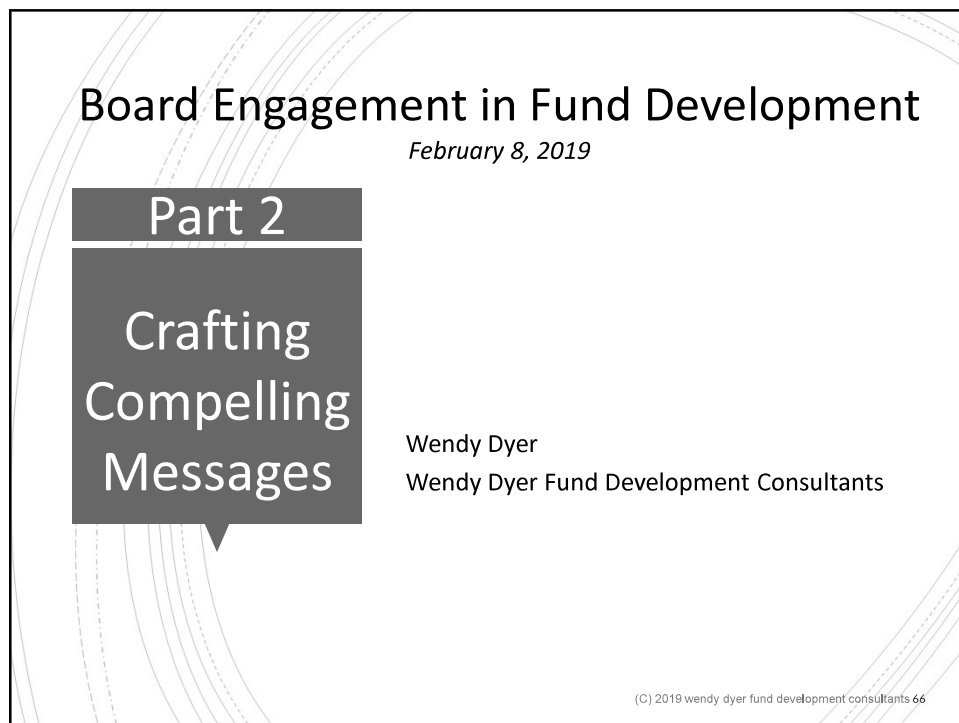
- This is a partnership
 - Board members must be willing and able
 - Staff must put in the time and effort
- It may mean making some tough decisions around current board membership
- It requires that you recruit and onboard new members in a strategic and intentional manner
- Board members need to understand your business model
- Always be asking questions and evaluating progress & results
- Be strategic in how you ask your Board to fundraise
- Focus on mission, passion, and program understanding
- Develop a compelling case statement Board members can deliver

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Today!



REMINDER - NO SILVER
BULLETS!



PUT SOME SIZZLE INTO
YOUR MESSAGE



RECOGNIZE DIFFERENT
AUDIENCES NEED
DIFFERENT MESSAGE



TIPTOE INTO THAT
SCARY ZONE OF ASKING
FOR MONEY!

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But First, a Few Philosophies!

- Nobody is sitting around wondering what to do with their money
 - *It's only as important as we make it*
- Rid yourself of derogatory language
 - “Low hanging fruit”
 - “Cultivate”
 - “Solicit”
- Change our behaviors (and thoughts) to change donor behaviors
- Get out of your comfort zone – don't stay safe!
- I.E. Millstone quote
People are giving money away anyway – might as well be to you!

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Please Remember These Things

- >\$400 billion donated in U.S.
 - \$4 billion in STL region
 - What do we have to get a piece of that pie?

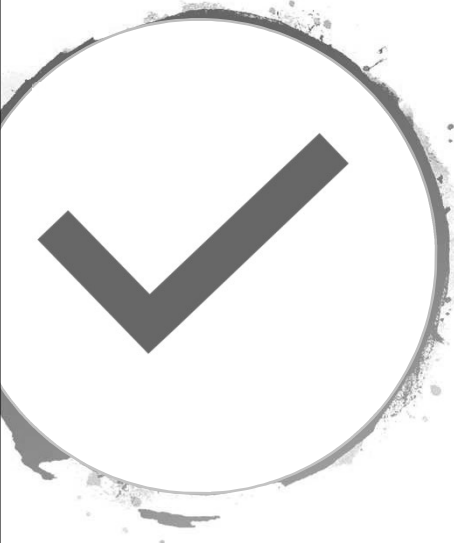
Donors aren't sitting around wondering where to make their next gift - It's only as important as YOU make it

- You will perform as you rehearse

Put the money into context very early on

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Donors are at the level we put them!

- It's not the donor's fault if they don't understand real costs – gotta put \$ into context early on
- If a donor attends an event for \$150 a ticket...
- Would people give at higher levels – if they knew?
- Let people know real costs– at events, in newsletters, in acknowledgement letters – everywhere! (\$6,000 example)

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It's Very Simple: What Do Donors Want?

To be known and valued

To know where their money went

To know their gift made a difference

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All We Have is What We Share – Make it Sizzle!

The “Why” we exist

What it costs

Where the \$ gets spent

What it changes

Make it tender and relatable

Share something that would SURPRISE us!

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30 Second
Commercials!

Create 30 second commercials

- Take your sizzle sheet and roll it into a 30 second blurb – be sure to include the \$ piece
- Turn to your colleague and practice!

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Tricky Part
is...

....need a multi-
channel approach

AUDIENCE	DESIRED BEHAVIOR	MESSAGE TO MOTIVATE	HOW OFTEN	BY WHOM

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Start the Conversation!



Discovery Calls

1. No pressure on you
2. Allows you to have meaningful conversations
3. Use your sizzle and put the money in context!
4. Make sure you follow up afterward to keep the conversation going, i.e. *What more would you like to know to...? When can I get back to you on...?*

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Set it Up



- Call reluctance is common
- Options: letter vs. email vs. phone
- IF you send a letter – follow up – still have to call eventually!
- IF you email (easy to ignore) and get no reply – re-email in 2 days and if no reply, call in 2 days
- IF you call – leave voicemail
- IF you want to get someone's attention – call!

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Get That First Visit

- *It was so good to see you at _____ and I'd love to ask you to come in again so we can update you on _____ to see how you'd like to be part of this project for the community. Can you join us on _____?*
- *I am excited to spread the word about our plans to _____. OR I have agreed to step up and rally people behind _____. Can we set a time to visit for a half hour on (specific date)?*

Create your favorite and practice!

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Put Relationship Into Context



You've been part of our family here for 18 years



You've been one of our most committed volunteers for more than a decade



When you served on the board, you helped us get through some really tough times that put us on a solid path



Discuss: think of some special relationships you/your agency has with your donors

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**Asking for \$
= 10 seconds
of Courage**

*So, to make such an impact on ___'s life (or #),
we need to raise \$_____.*

*We already have \$_____ so far – what do
you want me to ask you for?*

*In fact we just got a gift of \$_____ (make
it similar to what they might give) and we
were so excited.*

*Can you see yourself making a pledge in
this range?*

*I'm a rookie asking this and I might be out
in left field, but I was hoping you could
pledge \$_____?*

*I'd love to ask you for \$_____ but the reality is
I don't know where this fits in your
philanthropy so lets talk about that.*

Exercise: Say it then SHUT UP!

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What If They Say

1	2	3	4	5	6	7
They need to think about it...	They need to talk to their spouse...	They need to talk with their children...	It sounds like a lot of money...	I thought you'd ask for more...	I thought you'd ask for less...	What are some other fears?

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