

# *United Way of Greater St. Louis Strategic Transition Series Toolkit to Ask for Money*

## **MAKE SURE YOU HAVE YOUR MESSAGE AND RATIONALE AS TO WHY YOU NEED THE MONEY**

Make sure it has some “sizzle” and is relatable and you know how much money you need.

## **WHO WILL TAKE YOUR CALL?**

Think about people or companies or churches/associations who can make a decent gift or pledge. Reflect on who cares about the issue you address. Think about your consistent donors, regardless of their level of giving. Think of people who have attended your events, or were guests at your events.

## **SCHEDULING THE “DISCOVERY CONVERSATION”**

1. Don't be tempted to do the business over the phone – your only goal is to get the appointment
2. Be date and time specific
3. Remember the spouse/partner when appropriate
4. Send a pre-letter indicating that you will follow up (sort of the old-school way but some prefer)
5. Send an email or make a call to schedule the visit

Here are some examples you can put into your own voice:

*I am excited to be part of an important project and I thought you would like to know about it –I ask you to join me for two hours that you won't ever forget – we start at 8:30 a.m. and you can still get a full day in afterward. How about (date)?*

*You've been such a great supporter – I'm excited to share with you our expansion plans and invite you to join me to see our potential new facility. What does (date) look like for you?*

*I made a promise to serve on one of the best nonprofits in town. Part of my promise is to share this project with others and I'd like to invite you to meet with us and I think you'll be super impressed. How about (date) at (time)?*

## **DISCOVERY CONVERSATION – TRY TO GO IN PAIRS**

### **Volunteer**

- Thank prospect for meeting and for their past generosity over the years.
- Share why and how you got involved and what it means to you
- Gently ask about their own experience with the “issue” you are addressing
- *(Remember to pause and give them a chance to engage)*

### **Staffer**

- Share your sizzle
- Why do you need to raise money
- How much and how does that break down per person, classroom, month, etc.
- How the money will be spent

- What the money accomplishes/results in/outcome
- *(Always pause and give them a chance to talk/ask questions – ask them if they have thoughts or questions along the way)*

### **Volunteer or Staffer**

- Speak to why you financially support the organization
- Be sure to ask them what are their thoughts on how they'd like to continue the conversation, what would they like to know, would more would they like to see, etc.?
- *(stop and listen to response)*
- Make the ask (only if appropriate) IF they have indicated they are ready to talk about what they might like to do, or agree on follow up
- You could say something like:
- *What is your impression of the project?*
- *Can you see yourself supporting the project at some point?*
- *Thank you for talking with us about the project – when would be a good time to continue the conversation about what you might like to do?*
- *What additional information would you like to explore before thinking about what you might like to do for the project?*
- *When would you like me to get back to you?*
- *Are you ready to make a decision about what you'd like to do?*

### **Make the Ask in Your Words**

Here are some examples of how you can ask someone to consider making a gift. The actual ask should come from the most appropriate person, whether it's a board member or other volunteer, or a staff member. If you find that you just can't belt out the ask (remember it's only 10 seconds of courage), you can always tell the sizzling message and then hand them a thoughtful proposal that they can read at their leisure. Either way, please remember to agree on a follow-up and then do it!

*This is where we are with what we need to raise for the year (show amounts to-date) and these are the gifts we need to finish it up (you could use a gift table – see me for more information). How much do you want me to ask you for?*

*We are very honored to be part of this project and we made a gift that was big for us because the return for the community seemed like a bargain. Are you ready to decide what you'd like to do?*

*I don't want to ask you for too much or too little but the reality is I don't really know what you'd like to do but I do know that we need to raise \$\_\_\_\_\_ to fulfill our promise to the people who count on us.*

*I'd like to ask you for \$\_\_\_\_\_ but I don't know where this project fits into your philanthropy so let's talk about that a bit.*

*This may be out of left field, but to make this happen, we need leadership gifts so here goes: what about keeping your annual giving where it is, and then making a special pledge of \$\_\_\_\_\_ per year over five years for a total of \$\_\_\_\_\_?*

*You might think I'm crazy but this project is that important that I have to take a chance – would you consider making a gift this year in the range of \$\_\_\_\_\_?*