

## **FUNDRAISING FUNDAMENTALS**

### **Part 5 – The Ask: Personal Solicitation**

#### **Elements of a Personal Solicitation**

Because you will have limited time with your prospect (generally 30-45 minutes) be organized and prepared. Not only will the meeting run smoothly, but you will demonstrate professionalism and enhance your credibility.

#### **Getting Started**

- Thank them for meeting with you and introduce the team
- Make a personal connection if possible by handing out information packets and, where appropriate, mention connections to children, spouse, community activities, etc., you have found through your research
- Acknowledge previous support/relationship with your organization
- Articulate your awareness of their interests or related support
- Try to get them to talk about their interests/priorities
- Use this information to lead into “making the case”

#### **Make the Case**

- Get a feel for what they know about your organization
- Make your case bigger than your organization. Give a vision for the future of your city or neighborhoods
- Emphasize your organization’s ability to make a unique contribution to realizing the vision
- Delineate the outcomes you expect (“return on investment”)

#### **Be ready to answer questions**

- What are your income sources? What will you do if your income increases? Decreases?
- How many people do you serve? Who are they?
- What are your results? How do you measure them?
- What do donors get for their investment?

#### **The Ask**

- Involvement
- A specific amount or non-cash resource
- Their review of a proposal
- Seek investment, not charity. Talk about yield on investment
- Once you ask, be quiet and wait for their response; don’t worry if there is a pause in the conversation
- :Listen and respond

#### **Closing the Meeting**

**Closing the Meeting:** A lot can happen once you make your request, from an on the spot commitment to a negative reaction. Here is how to respond to the most common situations:

**If...**

They make a commitment,

They ask for or agree to review a proposal,

They resist or respond negatively,

They object to the amount you have requested,

They say they have already contributed To an umbrella fund, such as the United Way,

They indicate an interest in other areas,

**then...**

Restate what you understand their commitment to be. Make your own commitment to follow up with them. Above all else, thank them and ask if they need anything in writing from you.

Narrow down what they are interested in, and commit to delivering a proposal by a certain date. Follow through by submitting the proposal.

Ask what their specific objections are and try to counter them. If you cannot get an immediate commitment, ask them to review a proposal.

Ask for a multi-year pledge, or ask what they would consider.

Explain how your work differs, serves a distinct population, or meets a disparate need.

Empathize, but bear in mind that few people or organizations give to only one cause. Bring their attention back to your clients by explaining how their gift will make a tremendous difference to these people and to the community. Your research on their priorities is critical here.

They do not see the link to their interests,

Explain the links you see and try to get them to agree with your statements. Presumably you are there because you did your homework and have reasons to believe your work does fit their interests. Ask if you can submit a proposal explaining the linkages.

**Follow up**

Within 24 hours, send a letter thanking them for their time. If they made a commitment, restate it. *Add link to Thank You Letter Samples*

If you're sending a proposal, commit to the deadline 2- weeks or whatever terms you have mutually agreed upon.

File copy of letter in Prospect file.

Complete and submit proposal if promised.