

**Sample letter:
Setting up the face-to-face ask**

Martina Jones
123 Main Street
Des Moines, IA 55555

Dear Martina:

It's that time of year again – we're doing our annual fundraising campaign in support of (brief description of your mission). Last year, you made a very generous donation of \$500, which is a big gift for us, and we really appreciate your support. Contributions from people like you helped us to accomplish the following:

- (Big, impressive accomplishment)
- (Not so big, but still impressive)
- (Something interesting the donor is unlikely to know about)

This year, we face a number of challenges:

- (Big, scary challenge – maybe increased demand for your services?)
- (Not so big, but still impressive)
- (Perhaps something related to organizational development, rather than external factors)

To meet these challenges, we are asking our most generous supporters to consider doubling their gifts, which in your case would be a contribution of \$1000. I appreciate that this is a big commitment, so before you decide, I would love the chance to meet with you, give you an update, learn more your interest in our work, and ask for your support.

I will be calling you next week to set up an appointment.

Again, thank you for your generous and loyal support. I look forward to speaking with you, and meeting with you, very soon.

Warm regards,

If you're uncomfortable naming a number, consider language like this:

We're asking for gifts of between \$500 and \$5000 toward a campaign goal of \$50,000. To be honest, I have no idea how much to ask you for, so let's sit down together, discuss it, and you can tell me how much would be appropriate.

If you're soliciting a new prospect, the relevant paragraphs might be:

As you might know, I'm on the board of Everybody Loves Everybody, which works to (brief description of your mission). Our organization has a long history of success, including (insert bulleted items here).

One of my tasks as a board member is to identify new supporters for our work. We've set goal of \$_____ and we're seeking donations of between \$_____ and \$_____ to help meet that goal. I'd like to arrange an appointment so we can discuss the work and see if you'd like to contribute.

Use these letters as templates by adapting the language and tone as you see fit. In writing the letter, keep the following points in mind:

- **It's brief** – no more than one page.
- **It says “thank you.”** It acknowledges past support or, in the case of new prospects, it thanks them for considering a gift.
- **It's explicitly about fundraising.** It doesn't hint or use code words – your intentions are clear from the start.
- **It includes numbers.** It mentions the amount you seek or suggests a range of gifts.
- **The purpose of this letter is not to get money, but rather to get a meeting.**

It's not necessary to craft a piece of great literature – after all, this is a one-page “I want to meet with you” letter – so don't strive for perfection. It might make sense for one person, perhaps a staff member, to prepare a standard letter that board members and other solicitors then customize. Get it done and mail it out.

Finding Major Donors by Mail

By ANDY ROBINSON

Most grassroots groups tend to focus their fundraising on two inefficient and risky strategies: grant proposals and benefit events.

Grants are problematic for at least two reasons. Foundations and corporations, which distribute grants, provide only 12% of the private-sector money available to U.S. charities, so groups that rely on grant funding are chasing a small piece of a very large pie. Furthermore, fewer than 15% of all proposals submitted are actually funded, which makes for lousy odds.

Benefit events, on the other hand, are great for identifying new donors and increasing the visibility of your group, but as a pure fundraising strategy they're terribly inefficient. Consider the "work-to-profit" ratio: If you applied the same number of staff and volunteer hours and the same expense budget to other strategies, could you raise more money hour-for-hour and dollar-for-dollar? In most cases, the answer is a resounding yes.

So where should you put most of your fundraising effort? Find and cultivate individual donors, especially potential major donors. In a typical annual campaign — seeking unrestricted individual gifts that all groups need to survive and prosper — just 10% of the donors provide a whopping 60% of the money. If you identify the right people and approach them in the right ways, you can build an effective major donor program to cover a big piece of your budget.

PUTTING THEORY INTO PRACTICE

To understand how this works, consider The Wildlands Project of Tucson, Arizona, a nonprofit conservation group working to establish a network of linked wilderness reserves across North America.

When I began working with Wildlands in January

1996, the organization had an annual budget of \$300,000, most of which came from three foundations. Board and staff were understandably nervous about relying on such a narrow funding base, and sought help both to diversify foundation support and to build a major donor program that would increase their small donor pool.

In designing a fundraising strategy to reach individual donors, we were restricted by two factors:

- *The Wildlands Project is not a membership group and, for two reasons, did not want to become one.* First, it is not equipped to manage and service a large membership base of \$25 donors. And, perhaps more important, because one of the organization's primary goals is to improve cooperation among national conservation groups, the board chose to avoid mass mailings and the perception of competing with other groups for their members.

- *The project could not solicit many major gifts in personal meetings.* The Wildlands Project works throughout North America and has an international board that meets just twice each year. Given the vast geographic distance between staff, board, and prospective donors, and the relatively low buy-in they had decided on for the major donor program (\$100 and up), it would have been too costly and logistically difficult to solicit many prospects in person.

As a result of these considerations, we decided to build the campaign around small, personalized mailings. Our goal: 200 individuals donating between \$100 and \$5,000 each, for a total of at least \$50,000 in 1996.

WORKING THE "HOUSE LIST"

For starters, we reviewed the group's donor list and found 265 people who had given \$50 or more during the previous two years. This was the first, and best, pool of prospects for major gifts.

To solicit them, we mail-merged their names into an appeal letter using the office laser printer. The mail merge allowed us to personalize each letter with name, address, and salutation: “Dear Fran” instead of “Dear Friend.” The letter also requested substantial gifts: “Whether you can contribute \$100, \$1,000, or more, we need your help.”

The letter was a page and a half long — front and back on board letterhead — and included signature spaces for both the chairman and the board president. (One is a prominent biologist, the other a nationally known conservation activist.) Both men signed all letters by hand in colored ink.

So far, so good — personal letters signed by real human beings. We took this stack to the next board meeting and read off the names with the request, “If you know any of these people, raise your hand and add a note.” The blank half-page on the back would accommodate their personal greetings.

At least 100 of these letters ended up with personal notes. A few contained five or six notes, which makes for a compelling request (talk about peer pressure!). Board and staff enjoyed this exercise and were eager to learn which of their contacts contributed.

As a final touch, we hand-addressed the envelopes and applied a first-class stamp. Hand-addressing is the most effective way to ensure that the envelope is opened; a “live” stamp also helps. We included a response envelope and a remittance card, with check-offs beginning at \$100 and going up to \$2,500, to indicate that we were serious about receiving a substantial gift.

This appeal generated an impressive 33% return and nearly \$30,000, including one gift of \$10,000 and another of \$5,000. After subtracting these two big contributions, the average donation (including 34 gifts of less than \$100) was \$164. This one mailing produced more money from individuals than everything Wildlands had tried during the previous two years. This group of donors was solicited again in December, seven months after the first letter, and the checks continued to come through March, generating more than \$20,000 in additional gifts.

BRING US YOUR NAMES

Once the first mailing was completed, we asked board members to go through their personal address books, Rolodexes, and databases to identify prospective donors. Their instructions: Put aside any concerns about whether these prospects can afford to give \$100, and focus on their relationship to you and their concern about the environment.

We also contacted several national conservation

groups (The Nature Conservancy, National Audubon Society, The Wilderness Society, etc.) to request copies of their annual reports. These booklets contain pages and pages of major donors, sorted by the size of their gifts. After photocopying these donor lists — 62 pages of names — we distributed packets to all board and staff and asked them to check off anyone they knew.

We reasoned that these people would make excellent prospects because they had a relationship to the solicitor, they had proven their concern about conservation issues, and they had proven their ability to make a big gift. The process of reviewing these lists “triggered” other names, which increased our pool of prospects.

Needless to say, list screening is miserable work: boring, time-consuming, and seemingly pointless. One board member was embarrassed to review more than 5,000 names and find only five people he knew — but one of those five came through with \$1,000. Now he doesn’t need to be convinced.

In the many cases where board and staff knew prospects but did not have an address or phone number, we used a CD-ROM product available at the public library. PhoneDisc, an electronic compilation of most phone books in the country, provided good addresses for at least two-thirds of our “missing persons.” As an alternative, try one of the many online databases. Our local library’s Web site — www.lib.ci.tucson.az.us — links to several directories, including AnyWho, Switchboard, The Ultimates, WhoWhere?, and Yahoo. Click on “Web links,” then “directories.”

After gathering names and addresses, we again mail-merged them into an appeal letter signed by the person who knew them best. After the signer added a personal note, other board and staff were asked to add notes where appropriate. As before, we hand-addressed the envelopes, affixed a first-class stamp (from the Endangered Species commemorative series!), and included a response card and remittance envelope. For these new prospects, we also enclosed a brochure about The Wildlands Project.

Through this process, board and staff identified and solicited more than 400 additional prospects; most received two letters six months apart. The result: Forty donors provided \$11,650 in large gifts, with two dozen sending smaller donations.

All told, we contacted 700 major donor prospects; 177 responded with nearly \$65,000 in contributions of \$100 or more. About one-third of these gifts were received from board members and at benefit events, and a few others were unsolicited, but the rest were raised through the mail.

WHAT WE LEARNED

1. Personal attention makes a big difference. The old cliché is true: People give money to people, not organizations. The more personal the contact, the more effective our fundraising. Next year, we plan to approach selected donors and prospects by phone and, when feasible, in person.

2. You don't need rich people. Most of our contributors are college faculty, non-profit staff, doctors, activists, teachers, homemakers, retired people, etc. We have very few "name" donors.

3. Small is beautiful. Big national groups will not give this much attention to \$100 or \$500 donors, but grassroots groups can and should. This is the strategic advantage of being small.

4. Don't try for more major donors than you can service. Our goal was to enlist 200 major donors in 1996. Given our limited staffing, we figured this was the largest number we could maintain strong relationships with. We continue to send them personal notes and treat them as part of the family.

5. You can't save time. Every stage of this process—screening lists, mail-merging and hand-signing the letter, writing notes, hand-addressing envelopes, etc. — is time consuming. If you want to build a successful major donor program, you can't take shortcuts.

6. It works. This successful major donor strategy tripled income from major donors of The Wildlands Project within one year. Try these techniques with your own organization and watch what happens.

The Wildlands Project

PROPOSED GIFT-RANGE CHART FOR \$50,000 MAJOR DONOR CAMPAIGN

RANGE OF GIFTS	NUMBER OF GIFTS DESIRED	NUMBER OF PROSPECTS (RATIO) NEEDED	TOTAL DOLLAR AMOUNT PER RANGE EXPECTED
\$5,000 +	1	10 (10:1)	\$5,000
\$2,500–\$4,999	3	15 (5:1)	\$7,500
\$1,000–\$2,499	10	40 (4:1)	\$10,000
\$ 500–\$999	15	45 (3:1)	\$7,500
\$ 250–\$499	30	90 (3:1)	\$7,500
\$ 100–\$249	125	250 (2:1)	\$12,500
TOTALS:	184 donors	450 prospects	\$50,000

RESULTS FROM MAJOR GIFT CAMPAIGN

GIFT AMOUNTS	NUMBER OF GIFTS	TOTAL DOLLAR AMOUNT RECEIVED
\$10,000	1	\$10,000
\$5,000	2	\$10,000
\$1,500	2	\$3,000
\$1,243	1	\$1,243
\$1,000	10	\$10,000
\$600	1	\$600
\$500	17	\$8,500
\$400	4	\$1,600
\$350	1	\$350
\$300	5	\$1,500
\$250	18	\$4,500
\$225	1	\$225
\$200	18	\$3,600
\$150	4	\$600
\$125	2	\$250
\$100	90	\$9,000
TOTALS:	177 donors	\$64,968

"The Ask"

Meeting with your prospect

The purpose of this role play is to help you:

1. Develop confidence and clarity in your "pitch" -- how you present your work
2. Develop empathy for the person on the other side of the relationship -- the prospective donor
3. Improve your listening skills

Dramatis personae (Shakespearean for "the parts to be played"):

1. **The asker (or solicitor).** A volunteer or staff member who helps with fundraising.
2. **The prospect.** A current or prospective donor who is known to the asker -- in other words, they have a direct personal relationship.
3. **The observer:** who gets to watch and comment (after the role play is over).

By the end of the exercise, everyone will have the opportunity to play all three roles.

Setting up the role play

The asker reviews the prospect list that he or she filled out earlier and chooses one person on the list. The asker then trains the prospect to "be" that person by describing the prospect's current level of knowledge and involvement with the organization.

For example, the asker might say, "I want you to be my Aunt Rita. She always talks to me about my work and seems very interested. She came to our open house event last year but has never given. I know she attends church, which makes me think she is charitable, and when I was at the theatre I saw her listed in the program as a \$250 donor."

Where to meet: You decide. Your options include the prospect's home or office, your home or office, or a neutral location (such as a restaurant).

Asker

Your goal is to:

1. Introduce the work of your organization.
2. By asking questions, find out what the prospect cares about and how your work might address his or her interests.
3. Encourage the prospect to agree to a next step; this could include:
 - a. Make a gift or a pledge.
 - b. Suggest other prospects.
 - c. Volunteer to help with program or fundraising needs.

Bonus points: show and tell (visual aids)

Prospect

Your goal is to:

1. Learn more about this group without spending a lot of time.
2. If you can, identify one aspect of the group, the project, or the presentation that grabs your attention.
3. Provide a few objections or obstacles for the solicitor to address.
4. Based on the conversation, decide if you will:
 - a. Contribute or pledge today.
 - b. Delay your decision ("I'd like to think about it.")
 - c. Decline to donate.
 - d. Become involved in some other way.

Bonus points: Unexpected distractions (phone calls, pagers, other people going in and out, etc.) are allowed.

Observer

Your goal is to:

1. Watch, listen, take notes, and be prepared to talk about what you see and hear.

Bonus points: Save your comments for the debriefing period.

Structure of the meeting (instructions for the asker)

1. Briefly build rapport with the prospect by discussing any mutual interests, friends, etc
2. Uncover the prospect's needs and interests. Why does he or she care about your issue or programs? If the prospect were to give, what would s/he want in return?
3. Make a brief presentation about your work, allowing the prospect to participate and ask questions.
4. Ask for the gift, naming a specific amount or a range. After "the ask," keep quiet and wait for the prospect to respond.
5. Deal with any concerns or objections.
6. Close the meeting by re-stating and clarifying any agreements or next steps.

To "debrief" this exercise

1. The asker goes first. S/he says *two things about the meeting that went well and one thing that could have worked better, with an idea for how to improve it.*
2. The prospect goes next, following the same format.
3. Finally, the observer offers comments, following the same format.

Timing: Each side of this triangle (role play plus debriefing) takes 15-20 minutes. Then all participants rotate to a new role. Total time: 45-60 minutes. The facilitator will keep track of the clock and announce when it's time to switch roles.

Major gifts visit: Structuring the conversation

1. Build rapport. Chat a little. Start with topics that have no bearing on your organization or fundraising campaign. “How’s your job? What are your kids doing these days? I notice you’ve got your garden in; what are you growing this year?” Don’t spend a lot of time on idle chatter – the meeting might get away from you – but it’s good manners to ease into the topic at hand.

2. State your goals for the meeting. This step is optional but recommended. You might say, “Margarita, I’ve come today with three things on my mind. One, I’m here to tell you about our work. Two, I want to learn more about you and your interests. Three, it’s my responsibility to ask for your financial support. To tell you the truth, I’d like to know why you’re interested in our organization, so let’s start there.” This provides a clean segue into the next item.

3. Uncover the person’s needs and interests. Find out why he or she cares about your work. For a donor, the questions might be, “You gave us \$500 last year, which is a big gift for us. Why did you do it? Why do you care about this issue?” When talking with a prospect who is considering a first gift, perhaps you can ask, “What’s your experience with our work? Why does it interest you?” Initiate a dialogue by asking questions. Get the prospect talking.

4. Present your organization: your goals, programs, and financial needs. Tell stories. Where relevant, cite statistics. Keep it brief; don’t overwhelm the person with a blow-by-blow description of your 14-point strategic plan. If you have visuals that tell your story – maps, graphs, photos, charts, or site plans – this is an opportunity to use them. Encourage questions.

5. Ask for the gift. Be clear, explicit, and straightforward. “Sally, as I mentioned in the letter, we were hoping you’d consider a gift of \$1,000 to support our work. It would mean a lot to us. What do you say?” As an alternative, “As I mentioned in the letter, we’re looking for gifts of between \$500 and \$5,000. I appreciate that this is a wide range, and to be honest, we don’t know the appropriate amount to ask of you. How much would you like to give?”

Once you’ve asked for the gift, wait – *keep your mouth closed*. Don’t make excuses or start to backpedal before the donor has a chance to respond. Just sit quietly and wait.

6. Deal with any objections. Some of the objections you answered by phone are likely to come up again now. Think in advance about these objections and how you might respond. Practice your answers and bring notes to the meeting. For example, if the person says, “You’re asking for more than I can afford,” you can reply, “How much would you like to give?” In response to, “I’m unable to give right now,” you could say, “Do you want to make a pledge now and pay later? If that works for you, it works for us.” Most of these responses are nothing more than common sense, so:

- Take a breath,
- Ask yourself, “What’s the logical response to this concern?”
- Respond accordingly.

7. Close the meeting. Restate any agreements you’ve made so both parties leave the room with the same expectations. Once again, be clear, explicit and straightforward.