

Making the Ask: 10+ Steps to Successful Solicitations

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Step zero: Know thyself

- Know thy fears
- How do you feel about philanthropy?
- About money?
- Collect inspiring examples of happy donors and gifts that have made a difference...and cite them.
- Practice the words!

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"No, Thursday's out. How about never—is never good for you?"

Step zero: Know thyself

How do you explain a set-back?

Pessimistic

- **Permanent**

“My president is a weak fundraiser”

- **Pervasive**

“This place has no major gift culture”

- **Personalized**

“I’m not brave enough.”

Optimistic

- **Temporary**

“We could have prepared that ask better”

- **Localized**

“The project wasn’t right for him.”

- **Externalized**

“He wasn’t going to give six figures to anyone”

Courtesy Martin Seligman, Ph.D.

Step zero: know thyself

- The best fundraisers see the benefit to the donor when he makes a large gift; this only comes with experience and time.
- Optimists believe that good events have permanent causes and aren't just based on luck
- We have to believe that whatever the cause of the disappointment, it can be changed...
- but we also have to allocate our time wisely.

Step 1:

Know your Potential Donor

- Initial visit = 2-way evaluation
- Engage your donor
- Discover, qualify
- Generate interest, trust, information
- Discover interests, connections
- What is the donor's capacity to give?

The Initial Visit

- Ask how much time she has and finish early
- *Let her go first*
- Listen closely
- Confirm relationships: college, personal, business, civic; spouse's college and interests
- Observe capacity, inclination
- Make sure to leave with a next step confirmed

REMEMBER:

- Gift capacity is a function of income, assets ...*and obligations*.
- Capacity is a function of *perception and time*
- “No” may mean “not that asset” or “not now”

Step 2: Determine the Link

- Read files...but you don't need more research
- Restate the commitment they've already shown
- Look for an emotional link
- Tell stories (convey social norms)
- Test amounts and ideas

Step 3: Prepare and Rehearse

- Examine the request from the donor's point of view
- Who will ask? President? Provost? VP? Trustee? Assign roles in advance.
- PRACTICE. How will you begin? What words will you use to present the case?
- Bring written ideas to leave behind

Step 3: Prepare and rehearse

- Think about transitions...from reminiscing to discussion of a gift
- Anticipate curves and objections
- Determine the philanthropic decision-makers
- Accept that you will be thrown curves
(Trixie family)

Step 4:

Prepare the Donor for the Ask

- “Surprise is the enemy of diplomacy.”
Ask permission to ask.
- Tell stories to convey price tags
- The pre-emptive strike: The “askable” moment may come sooner than you think.
- Confirm details (spouse’s role?)

Step 5: Don't Rush

- Recount how you got to this point. Set the stage
- Don't assume understanding
- Don't skip steps. Even your closest friends need to hear why a gift is important.
- Create **gravity** and **importance** before you ask. Ground the moment.

Step 5: ASK

- Volunteers: “I believe, I support, I hope you will join me...”
- You: “I am glad that you share our commitment to this project. Your leadership is important to its success. That is why today we want to ask you to consider a gift of X.”
- The request is only the **FIRST** part of negotiating the gift

Step 6: BE QUIET

- You've had lots of time to plan the specifics...the donor has not
- Giving decisions are emotional and this affects cognition
- People need time to THINK after you ask for a big gift



"The proposal sounds good. Of course, I still have to run it by my people over at the Psychic Friends Network."

Step 7: LISTEN CAREFULLY

- Make sure you really hear what she says
- Listen for positive indicators:
“We” not “You”
- Watch body language
- Clarify and certify the reaction
- Identify the crucial objections, concerns
- Answer only the objections presented

Step 8: Discover objections

- Anticipate and prepare for many kinds
- Discover and acknowledge the objection
- Clarify, certify, repeat it
- Moderate, verify, reply
- Don't defend...transcend

Step 9:

Negotiate and Close

- **Keep your donor's needs in mind**
- Rehearse several possible closings
- Address remaining thoughts, concerns
- Obtain advisors' help if necessary
- Understand your donor's needs before closing
- Make needed alterations to original request

Work on how, not just how much

- Find out what he is saying no to...
- That amount?
- That amount over time?
- That asset?
- Loss of income?
- Fear of outliving resources?
- Find out what worries your donor about the request

Step 10: Say THANK YOU

- You can't say thank you enough
- President and Board Chair should also thank donors for large gifts
- The best thank-you is prompt, accurate implementation of the gift for its purpose...and suitable progress reports.

Step 11: Follow up

- “Solicitation is a process, not an event”
- Agree on next steps
- Develop a recognition plan
- Stewardship: on paper, “living”
- Continue communication and involvement. Don’t drop those who did what you asked!

Most common failures to close

(courtesy Gary Evans, Lafayette College)

- Fear of rejection
- **Did not request a specific amount**
- No trial closing
- Did not find the real objection
- Talked past the natural closing
- Did not find—and confirm—agreement
- Failed to present “the dream”

Curve balls

- Upon our first meeting: “How much are you going to ask me for?”
- Family interference
- Unstable donor
- President won't ask for the order...or asks too little

What curve balls have you successfully faced?

Bonus Rule:

Don't Make It Mechanical

- Pay attention. Respect your donor. Guide him toward increasing commitments.
- Ask narrowing questions
- Be deliberate...but never formulaic
- Be persistent but not pushy...gentle but brave.

Golden Bonus Rule: It takes as long as it takes.

- A campaign can spur action, but...
- Solicitation is a process, not an all-or-nothing event
- Warm-up and trial gifts count.
- In major gifts work, we are on the donor's timeline, not just our own.