



Don't Let the Gotchas Getcha When Asking for Money or, the Etiquette of Asking

Would you make the grade in Miss Manners' fundraising class? See how many of these rules you follow.

BY JEAN BLOCK

If there were a Miss Manners of Fundraising, and your staff got straight As in her Fundraising Manners class, I guarantee that your success rate would increase. It's often the subtle nuances of asking that trip you up—and that you can easily avoid. Don't discount how critical the etiquette of asking can be.

In the Beginning . . .

Let's start at the beginning. The basis of all good fundraising is *marketing*. In the truest sense of the word, marketing means *finding a need and filling it*. It does *not* mean selling someone on your idea. It means finding what your prospective donor needs or wants and then developing a way to fill that need. Let's face it: When your donor's needs are fulfilled, your needs are fulfilled because you get funding or whatever you've asked for in return.

It's that simple. It's an exchange. It works for both of you. And it works whether your donor is a wealthy individual, corporation, small business owner, or foundation. You give your donors what

they ask for and you get what you need in return.

Never, Never . . .

A couple of years ago, several corporate giving officers and I sat down and created a list of the most important issues in the etiquette of asking. We listed the things nonprofits should never do and always do. That list follows. Take it seriously, because these are the gotchas that can getcha if you aren't careful, ruining all the relationships you've worked so hard to build. Let's begin with the Never-Nevers.

Never Send a Request to "Dear Friend."

Do your homework and find out the appropriate person to receive your request, the person's correct title, and *how to spell his or her name*. Of the many requests funders receive daily, you would be amazed at the number of impersonal requests or requests with misspelled names or incorrect addresses. If you can't find the time to do it right, don't

do it at all. A wrong or misspelled name gives a direct message that you don't care. What will funders feel about your attention to their requirements if you can't even get the funding officer's name right?

Take the time to research donor needs, and narrow your search until you find close matches. Then take the time to get it right the first time. Remember that funders get hundreds (or thousands) of requests, and yours must be right to get through the gatekeeper. Don't let the first impression be the last impression!

Never Ask the Right Funder for the Wrong Thing.

While you're in your marketing phase of fundraising, research your prospective donor's giving requirements. Request and read annual reports and giving guidelines. If your prospect funds bricks and mortar, don't ask for program funding. If your prospect funds program, don't ask for capital funds.

If a new corporation comes into town and you don't have a clue what they fund, call for an appointment to meet the charitable giving officer. At the meeting, ask for information, not money. Ask what the donor funds and when. Some donors sponsor dinners; some funders don't. Ask how much the donor usually gives. Listen

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carefully. Decide what you have to offer that meets the corporation's needs.

Use this same approach when your prospective donor is an individual. Meet and listen. Decide how you can meet the donor's charitable-giving needs.

The best fundraising is based on strong relationships. That's what makes the marketing part of fundraising so important. Meet your donor's needs and your needs are met. It's a relationship thing.

Never Ask the Right Funder at the Wrong Time.

Research your prospect's giving cycles. Unfortunately, all corporations, foundations, and individual donors don't operate on the same giving cycle. For example, your need for capital funding to bring your facility up to ADA code requires improvements within the next three months, before May 31. The perfect foundation only receives requests during January. You ask and the foundation shelves your request for eight months.

Never Assume You're the Only One Asking.

On the contrary, imagine your prospect's mailbox full of requests from equally worthwhile nonprofits. You must work diligently to develop ways to show prospective donors how you are *different from* or *better than* your competition. Find a new approach to asking that sets you apart.

Never Disregard Funders' Guidelines.

In most corporations and foundations, someone has developed a set of charitable giving guidelines and priorities. Some funders need a list of your board of directors. Some don't. Some funders request a lot of "boiler plate" in proposals (audits, lists, pictures, etc.); some don't. Don't send what isn't requested.

On the other hand, don't overlook what the funder needs to make an

informed decision about your request. Include every single thing on the funder's list of required elements. If you can't, give a reasonable and honest explanation of why the item is missing.

One good marketing benchmark: If you can't meet all or most of the funder's guidelines, don't waste your time submitting a request.

Never Bypass the Decision-Maker.

Boy-oh-boy, can this backfire on you! OK, so you know the president of the corporation. Fine. Include the president *and* the charitable giving officer in your meeting. But if the charitable giving officer turns you down and you appeal to

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the president, you may eventually find yourself in the dog house. People get promoted and they have memories.

This doesn't mean you can't judiciously appeal your case, but be careful. Don't alienate the decision-maker and expect your next request to be welcomed with open arms.

Never Be a Pest.

It is appropriate to follow up on your proposal or request for funding. Once. Not every day. Ask your prospective donor when it's appropriate for you to follow up and how. In writing? In person? Next week? Next month? Be professional in your approach so that you remain a friend even if your prospect can't support your request.

Never Whine at Those Who Turn You Down.

Instead, find out what you need to do better next time. Do your marketing

research. Ask for an interview to discuss why your request wasn't funded. Don't be defensive; be open to constructive criticism. Ask about your written presentation, your oral presentation, and your perception of your prospect's needs.

Never Be Too Busy to Thank Donors.

OK, now is the time for all good nonprofits to get creative. Your job is to use this opportunity to connect your donors with the recipients of their gift! If you're a human service agency, create a handwritten thank you from a client. An environmental protection agency could send a leaf-print bookmark. Animal protection agency? Send a paw print as a signature on the recognition letter. Send a child's drawing. Send a photo. Use cookie cutters for clients to make holiday decorations. Don't spend a fortune to thank people, or they'll question your use of their contributions, but *connect!*

Here's an excellent rule: Spend as much time and effort on the *thanking* as you do on the *asking*.

Be timely as well as creative. Experts advise sending a recognition within 48 hours. Never let the acknowledgment languish on your "To Do" list. A tardy acknowledgment can destroy the fragile donor-agency relationship you've carefully built, and can give the donor the sense that you don't appreciate the support you've received.

Never Contact the Funder Only for Money.

Don't contact a donor only when your hand is out. Find ways to reach donors and prospective donors *without* asking for money. Ask them to join your board of directors or an advisory board. Send newsletters and progress reports. Showing donors what you're doing with their donations is a vital part of relationship-building.



Always, Always . . .

There are several important rules you should *always* or *often* follow, such as . . .

Always Look for Ways to Collaborate.

Since you aren't the only one asking, look for ways to collaborate with other nonprofits to increase the impact of your request. If you're a shelter for the homeless, for example, collaborate with a food bank to request combined funding. If you're a preschool, submit a joint funding request with a daycare for the elderly.

Don't fall into the trap of thinking you'll get less if you share. Donors may be more willing to fund a combined request than a single one. They know that's the best way to maximize the impact of their donations.

Always Do a Quality Control Check.

Proofread your proposal and your supporting materials. Then ask someone else to proofread. Step outside the office door and return as if you were a prospective funder. Look at your materials from an outsider's point of view. Check to see if all the guidelines have been met.

Have you spelled the donor's name correctly? Do you have the proper title? You'll cast a pall over your dynamite request if the funder can't get past the cover letter.

Check your formal presentation. Practice and role play with others. Anticipate a prospective funder's questions and have answers ready. Pull the team together and prepare an informal script. Then practice it so that you appear prepared and professional.

Always Ask in Person.

A request for a significant gift should be made in person whenever possible. Part of your research into the donor's needs is choosing the right per-

son to do the asking. It might be any of the following:

- your organization's executive or board chair
- a client or end-user
- a friend of your organization and the prospective donor
- a vendor or client of the company
- a combination of the above.

Decide who will take the lead in the presentation, and rehearse your request in advance. During the presentation, remember to listen as much as you speak. Listen for expressions of interest and for hesitations, and be prepared to react quickly. If your prospect can't immediately affirm the donation, ask for a time to follow up. Then don't forget to do so.

Collaborate with other nonprofits to increase the impact of your request.

Always Give Plenty of Lead Time.

Be the requester who stands out by being the most considerate of the funder's time. If you don't get your request in on time, why should the funder reorder priorities to meet yours? Part of your marketing research should include a question about timing for requests to be received.

Always Follow Up on Requests.

You can follow up without being a pest. Call once after sending a significant request to ask if it has been received and if additional information is required. Find out when the funding decision will be made, and ask whether you should call or

whether a notification will be sent to all who have requested funding. If an interview will be necessary, ask when you should expect to be called so that you have plenty of time to prepare adequately.

Always Ask Funders How You Can Show Your Appreciation.

Never assume anything. Do your marketing and discover what your donor needs or wants as recognition of a gift. Publicity? Bring out the photographers and the brass band. Anonymity? Keep the band in mothballs, or you'll ruin the relationship.

Always Strengthen Relationships Even If You're Turned Down.

Thank-you notes aren't good only after you receive a gift. Even if funders can't fill your request, send them a note thanking them for their time and consideration in reviewing your proposal. Use this chance to build a stronger relationship.

Always Ask for References.

Ask funders for references of others who might find your request attractive. Ask for a personal, telephone, or written introduction to the referral. Develop creative ways for funders to collaborate in supporting your program. Match vendors and retailers. Match service firms and clients. Can't think of an appropriate match? Just ask the funder and build a relationship while you collaborate to find the perfect match. Bring the funder into the process to build ownership.

Always Seize an Opportunity to Involve Funders.

Be creative with opportunities to involve donors in your program. Plan a visit or a tour. Set up a work party with corporate employees to paint, weed, repair your buildings. Submit regular articles to corporate funders' employee newsletters or corporate reports. Create a menu of opportunities for involvement with your organization.

Always Follow the Golden Rule.

Put yourself in your funder's shoes from the very beginning of the process. Research a funder's needs, ask creatively, thank promptly, and your relationships with funders will grow and prosper. ■

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CREATIVE FUNDRAISING IDEAS

Use Credit Cards to Increase Gifts & Raise Funds

A new program offers your organization increased community visibility along with an innovative way to raise funds. First, you sign up with the Bart Group's Charge-to-Care program, allowing your organization to accept credit cards. Then you ask local businesses to participate in the program. When they do, 5% of credit card processing revenue received by the Bart Group is donated to your organization!

Your ability to accept credit cards is an important way to increase donations. With credit card in hand, people feel free to be more generous. Such donations are also "safe" money—no more bounced checks or delinquent pledges. And corporations with corporate credit cards like to use them as much as possible, opening the door for even larger gifts.

For more information, contact Charge-to-Care, the Bart Group, 160 Main Street, Port Washington, New York 11050 (800-309-BART, bart@nais.com).

Try Fundraising with Video Biographies

Your organization can receive a percentage of the price of each video biography you sell—and at the same time help your donors preserve their heritage and their life story. Family Legacy Biography provides an affordable video biography or autobiography that people can pass down to their children and grandchildren, thus preserving their heritage and their unique story. Video biographies are of great interest to philanthropic individuals who want to share the stories of their lives and also their belief in charitable giving. For more information, contact Family Legacy Biography, 1501 LBJ Freeway, Suite 205, Dallas, Texas 75234-6048, 888-LEGACY4.

Think Small

A small-scale approach to personal dealings is the key to raising funds, says Lawrence Stroud of England's Botton Village. "The theory of our database," says Stroud, "is that 'any of our people can sit in front of a screen and say, for example, 'I want a report on donors in the town of Crewe, who are female, who are over 45, who are of the star sign Aries, who have a giving pattern of x, who received the white book but didn't receive the postcard, who have not completed the renewal form they were sent but did receive a telephone call, and who should be written to next week because that's their best time,' and get the report exactly as she wants. I can't think why we should want to write particularly to that type of donor, but I can't imagine how we can do real relationship building without that possibility.'" For more on relationship fundraising, see *Friends for Life*, available from the Society's Resource Center (800-424-7367).

Selected References

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*Starred publications are available through the Society for Nonprofit Organizations' Resource Center. For ordering information, see the Society's *Resource Center Catalog*, included in this issue, or contact the Society at 6314 Odana Road, Suite 1, Madison, Wisconsin 53719 (800-424-7367).



Jean Block was 13 years old when she organized her first fundraiser, gathering her school friends to produce a carnival for C.A.R.E., and she hasn't looked back since. She became hooked on developing both people and dollar resources for nonprofit organizations. She created her own consulting business in 1995, after serving for more than 30 years as staff, executive director, campaign director, and volunteer in a variety of leadership positions for both local and national nonprofit agencies. Jean's mission is to strengthen the base of support for America's nonprofit organizations, from school bands to multi-million-dollar national programs.

In 1996, Jean wrote and published *Fast Fundraising Facts for Fame & Fortune*, a work book/play book with stimulating ideas and how tos for developing dollar and people and other resources. The book has an inviting format, with real-life examples of how to get over hurdles and improve your fundraising skills. The book sells for \$25.00 and is available through Jean Block Consulting, Inc., 7624 Verona N.W., Albuquerque, New Mexico 87120.