



# Seven Steps to a Successful Gift

*Take the worry out of asking with this checklist.*

BY MARILYN BENUSKA

**A**sking for a gift needn't feel awkward or scary. Follow these simple steps:

## 1 Begin with yourself

Know your organization. Be able to articulate its mission, history, services, programs, structure, leadership, financial condition, and vision. Know exactly why you want to call on the prospect and what you want to accomplish. Consider your own experiences and how you would like to be approached. Think about how you make your decisions about giving and investing. Be a giver. It makes asking easier!

## 2 Research, research, research

Before meeting with a prospect to ask for money, be sure you have the answers to these questions:

- **Is the prospect financially qualified** to make a gift at the desired level?
- **Do the prospect's interests** match your organization's priorities?
- **Has the prospect given** to similar organizations?

- **What is the prospect's relationship** to your organization?
- **Who, within your organization,** knows the prospect best?
- **Is a cultivation strategy** in process?
- **Has the prospect advanced** through the "five I's" of fundraising: identified, informed, interested, involved, and invested?

Keep in mind the reasons people give money to nonprofits:

- **They give from emotion** and look for rational reasons to support that emotion.
- **They are more likely to contribute** to an organization that reflects their values and desires.
- **They give to organizations** that can solve problems they feel are important.
- **They give to people** they know, like, and trust.

## 3 Prepare, prepare, prepare

It's difficult to over-prepare for a face-to-face call. Preparation could be the difference between success and failure.

Most often, the team approach yields the best results. First, it spreads the responsibility. More important, if you

choose team members carefully, each will have a relationship with the prospect that the others don't. Brief the team and decide upon each member's role. Write a script, and rehearse.

Preparation isn't synonymous with rigidity. Remember that your prospect and your team are all people. People aren't totally predictable, no matter how much research has been done. Be flexible.

## 4 Set up a meeting

Call the prospect, and arrange a time and place to meet. Choose a location that will keep distractions to a minimum. Offer some choices, but let the prospect make the final decision.

Honor and acknowledge the prospect's time constraints. Make your request clear—date, time, location, duration—and stick to it.

## 5 Hold the meeting

Your meeting with the prospect should flow through the following phases:

- **The opening.** Engage in social conversation, perhaps addressing a special interest of the prospect. Introduce team members, and thank the prospect for



meeting with you. Emphasize that the meeting will be brief.

- **The presentation.** Tell your organization's story, with each team member playing a role. Make the story concise and enthusiastic. Reveal the case for your organization's request from the larger perspective to the more specific. Focus on the future and the benefits to recipients, not on the organization and its needs. Remember that giving decisions are driven by values and benefits.

- **Questions and comments.** This is a critical juncture in the meeting. Listen carefully. The prospect may question, comment, or raise objections—each indicates interest. The way you overcome objections, answer questions, and receive comments will shape the focus, format, and atmosphere of the rest of the meeting. Whatever you do, don't argue.

- **The specifics.** Explain how you would like to involve the prospect in your project. Address any questions you have about the prospect's giving priorities or other issues that might inform your decision about how much you ask for.

- **The ask.** This is what you came to do. Have the pre-determined team member ask for a commitment from the prospect. Perhaps the easiest way to begin this discussion is, "We hope you will consider..." Spell out everything you're requesting—for example, cash, technical support, volunteer support, or an in-kind gift. Define the terms of payment, and stress the importance of the prospect's participation and leadership.

- **Quiet time.** Following the ask, no member of the solicitation team should speak until the prospect has had a chance to think and react. This is

a pivotal point in the meeting. Give the prospect time to process the information.

- **The prospect's reactions.** The prospect may ask questions or explore alternatives to your request. Let the prospect respond fully.

- **Negotiation.** If the amount is greater than the prospect is willing to consider at this time, ask whether the prospect would consider the same amount paid over a longer period. If the response is no, reiterate the importance of the prospect's leadership in the project and perhaps suggest a lesser amount. If the answer is still no, ask what amount would be acceptable. Chances are the prospect will name an amount. If the suggested amount is appropriate for the project, accept it and express your thanks on behalf of the organization. If the prospect wants to think about it further, take this opportunity to establish the next steps, thank the prospect, and understand that you and the other team members have some work to do before your next meeting.

- **Next steps.** Be sure the prospect and all team members understand what the next steps in the process will be. For example, would the prospect like you to send a formal proposal? Has a subsequent meeting date been set? If follow-up with a phone call is requested, when will that occur?

If you were successful, congratulations! If not, you're probably excited and want another chance. Reconvene your team and start planning for your return visit.

## 6 Follow up

The rule of thumb is that every donor should be thanked at least seven times—not all through the same source, of course. But, at a minimum, promptly after a solicitation call, write a note thanking the prospect for meeting with you. If you promised to send information, do so.

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# CREATIVE FUNDRAISING IDEAS

## A New Twist on the Non-Event

The North Central Texas Chapter of the Alzheimer's Association (Fort Worth, Texas) has held an annual stay-at-home fundraiser for 14 years. The invitation asks donors to make a gift but instead of getting dressed up to go to an event, they can stay home and watch a movie that's broadcast on a participating TV station. The station wraps various PSAs and inserts about the organization around the movie. Their most recent stay-at-home fundraiser featured the movie *The Snows of Kilimanjaro*.

## Cars-for-a-Weekend Make Great Prizes

Can't get a car dealer to donate a car for a hole-in-one or other special-event prize? Instead, ask the dealer to offer the use of one or two demonstration cars. Winners get to drive the cars for a weekend of their choice, the dealer gets some great advertising, and you get a coveted prize for your event at no cost to you or the dealer.

## Attract VIPS to Your Event

To encourage people to sponsor your special event, offer sponsors extra benefits, such as: a preview party for sponsors only, held before the event; valet parking; pre-bid opportunities on auction items; distinctive name tags; special seating; up-close contact with a celebrity; public introduction at the main event. For more special-event ideas, see "Special Events Galore!", published monthly for \$79 per year by Stevenson, Inc., [www.stevensoninc.com](http://www.stevensoninc.com).

Be sure to complete an internal report about your meeting, including all the information you gathered about the prospect. These confidential notes may prove invaluable as you move forward.

## 7

### Continue the relationship

Remember that your goal isn't just one gift. You're aiming for a long-term relationship with your donor. To make this relationship work, you must be willing to do the following:

- **Understand your donor's needs** and the benefits you and your donor receive from your relationship.
- **Define what you're willing to give** or give up to sustain the relationship.

• **Understand the different motivations** you and your donor have for coming together.

- **Give the relationship** the time and energy it needs to succeed.
- **Keep in mind** that building a relationship takes understanding, appreciation, patience, and, sometimes, sacrifice. ■

#### Resources

- \*Alford, Jimmie, "Asking for Money," *Nonprofit World*, Vol. 17, No. 3.
- \*Edwards, Paul & Ernest Wood, "The Inner-Game Attitude of Major-Gift Solicitation," *Nonprofit World*, Vol. 10, No. 2.
- Flanagan, Joan, *Successful Fundraising: A Complete Handbook for Volunteers and Professionals*, New York: McGraw Hill.
- Klein, Kim, *Fundraising for the Long Haul*, San Francisco: Jossey-Bass.

\*Remley, Dick, "Relationship Marketing: Guaranteeing the Future," *Nonprofit World*, Vol. 14, No. 5.

\*Starred resources are available from the Society's Resource Center, [www.snpo.org](http://www.snpo.org).

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Nonprofit World • Volume 22, Number 4 July/August 2004  
Published by the Society for Nonprofit Organizations  
5820 Canton Center Road, Suite 165, Canton, Michigan 48187  
734-451-3582 • [www.snpo.org](http://www.snpo.org)