



**F R I D M A N**

**STRATEGIES**

# Making the Ask!: Practice Makes Perfect Solicitation Workshop for Lay Leaders



By Nanette Fridman, Principal, Fridman Strategies

# Goals

- Discuss the key roles of board members and volunteers in development
- Learn the mechanics of making the ask
- Practice soliciting to gain confidence and improve your technique

# Warm Up

- Name
- Organization
- Role
- Tell about the first time you remember making a donation. How did it make you feel?





# Key Roles for Board Members and Volunteers in Development

# The Annual Fund or Annual Giving

- Face-to-face solicitation with major donors
- Direct mail campaign to all non-major donors
- Phonathon



# Who is on the Fundraising Team?

## ➤ Professional Staff

- Executive Director
- Development Director
- Staff

## ➤ Lay Leaders

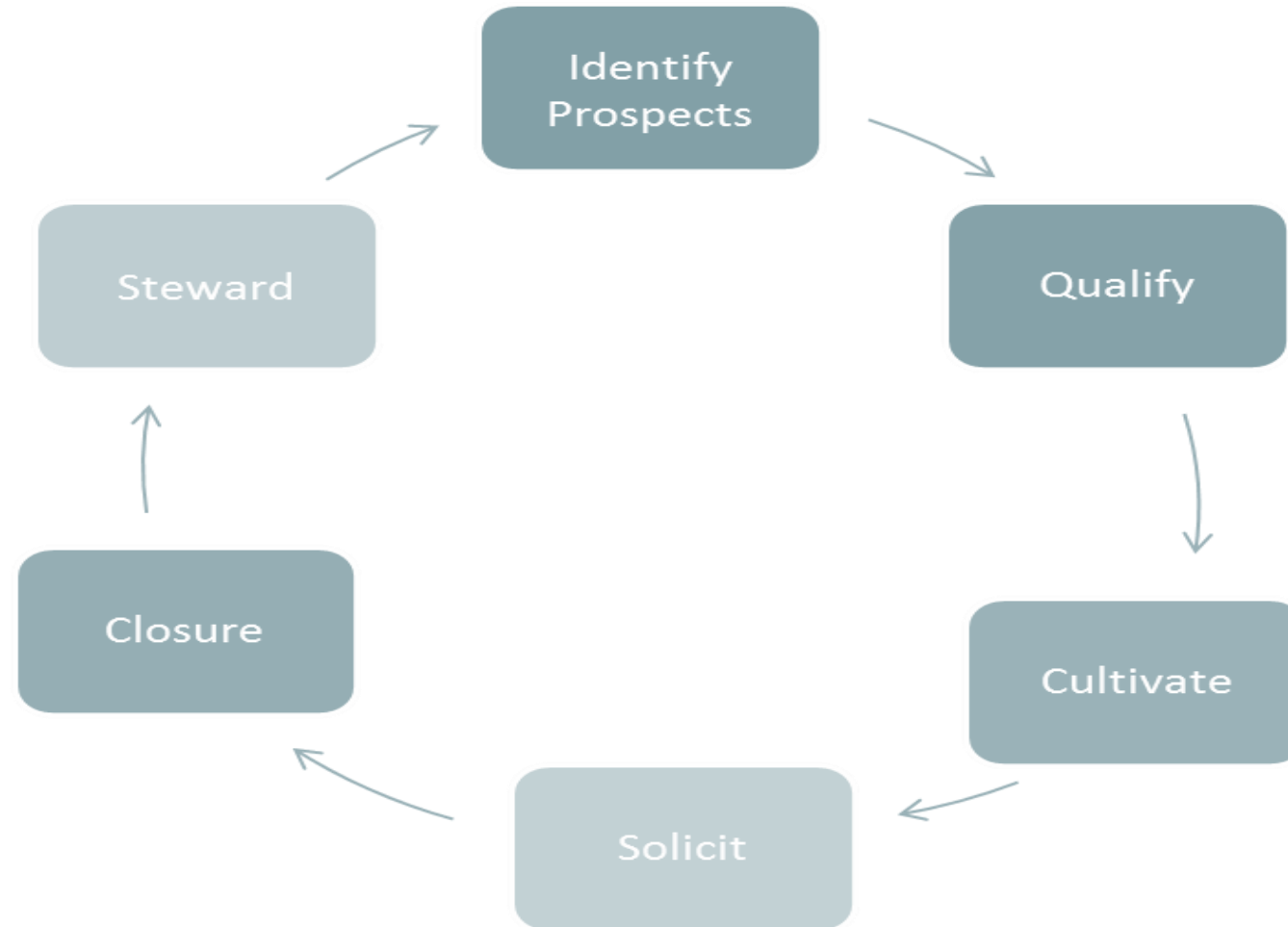
- President and Vice President(s)
- Development Committee Chair
- Board

## ➤ Volunteers

- Development Committee Members
- Past board members
- Event volunteers
- Phonathon volunteers
- Other volunteers

## ➤ Consultants/Contract

# The Development Cycle



# Prospecting from Your Network

- Those who you know care about or support those in need, Israel or community
- Those who have given to other Jewish, area or national organizations with similar or complementary missions
- Those who owe you a favor or two
- Those who have asked you to give



# Prospecting Outside Your Network

- Identify values-aligned prospects outside your network
  - Federation
  - Synagogues
  - Schools
  - Camps
  - Community centers
  - Other non-profits
  - Community and political organizations
  - Clubs and recreation centers
  - Other

# Cultivation/ Engagement

- **People give money to people**
- Takes time
- Develop personalized strategy with touch points
  - Personal email, letter or meeting
  - Shared experiences and goals

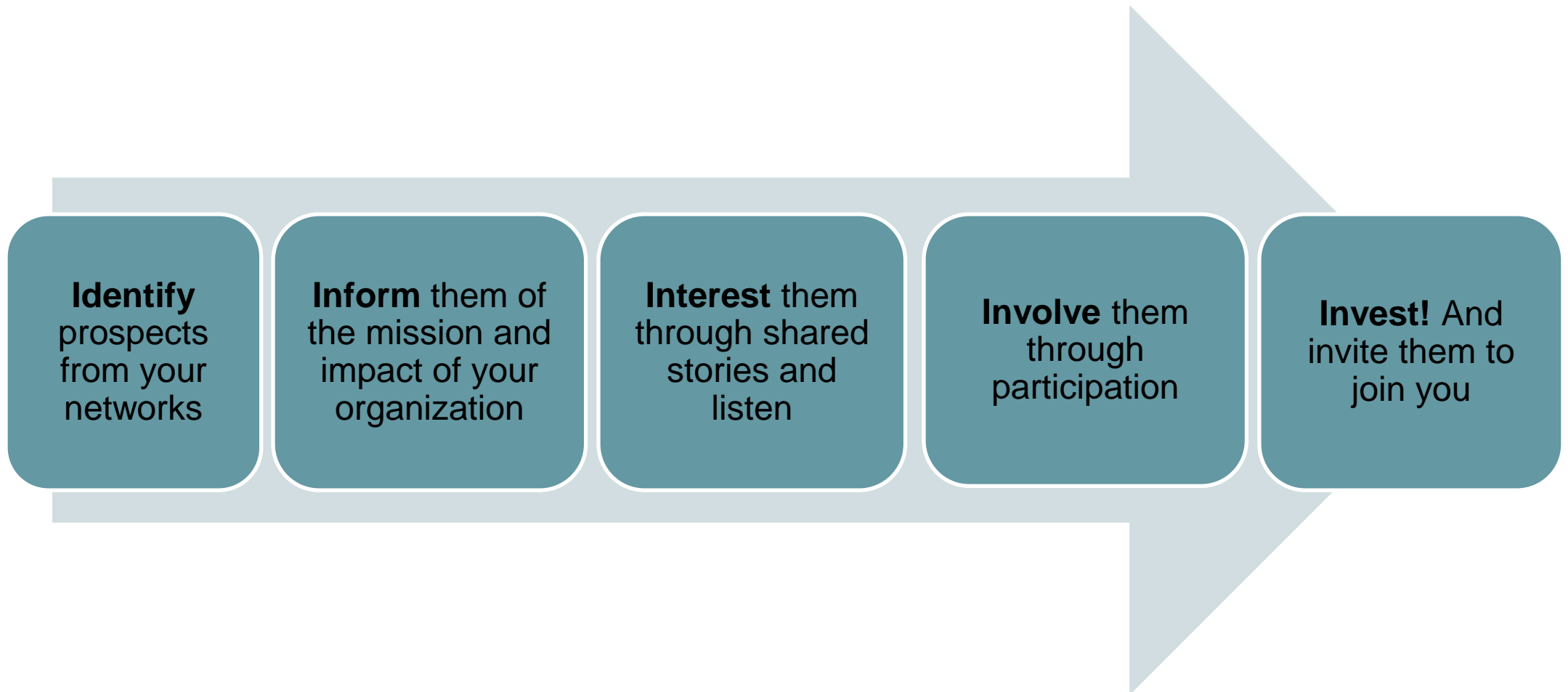


# Key Question

- Who is the right person or persons to do the cultivating and asking?



# The Cultivation Process – The “I”s Have It



# What is Required for the I's?

- Identify – Process for New Names/Info
- Inform – Elevator Speech and Conversation Starters
- Interest - Stories
- Involve – Engagement Opportunities
- Invest – Giving Opportunities



# Conversation Starters

## ➤ Conversations Starters Challenge



# Storytelling



- Why **you** care enough to be involved
- What **your organization** is called to do and an example of someone who has been directly impacted by your organization
- Why the listener should act **now**

# Cultivation Ideas

- What are some ideas for cultivating prospective donors?
- Keep in mind it is estimated to take between 7-10 “touches” before someone becomes a donor!



# Solicitation

- Learned Skill
- Sales
- Must demonstrate
  - Are you doing important work?
  - Are you well managed?
  - Will my gift make a difference?
  - Will the experience be satisfying to me?

# Closure



- Importance of reporting back outcome of meeting and information learned
- Keep the ball in YOUR court
- Follow-up
- Get over the finish line

# Stewardship



- Acknowledge and thank
- Report back on progress and impact of their investment
- Further personal relationship
- Keep informed of your organization's developments

A network diagram consisting of numerous small circular nodes connected by thin lines. The nodes are colored in two distinct groups: blue and red. The blue nodes are primarily located on the left side of the image, while the red nodes are concentrated on the right side. There is a central area where the two groups overlap, with some blue nodes connected to red nodes. The overall structure is a complex, interconnected web of relationships.

# Q & A



# Making the Ask

# The First Ask



# Donor Focused Solicitation

- The Best Solicitation Occurs when the **Right Prospect** is asked for the **Right Gift** by the **Right Solicitor** at the **Right Time** in the **Right Way**
- Determine the **Rights!**

# The Rights!

- **Right** Prospect
- **Right** Gift
- **Right** Solicitor
- **Right** Time
- **Right** Way

# Information for Solicitors

- Prospect/Donor Background and Ask Amount
- Talking Points and/or FAQs
- Case for Giving/Support
- Mission Statement

# Case for Giving

- Why is your organization worthy of philanthropic support?
- What will you do with the funding?
- What will be in impact?

# Solicitation Meeting: With Whom are you Meeting?

- Review prospect materials to learn about the prospect and his/her interests
- Know the ask amount and for what
- Past giving history
- Make sure that the decision maker(s) attend the meeting

# Solicitation Meeting: Getting the Meeting

- Use the phone to ask and email/text to follow up/confirm
- Confirm day before time, date & place
- Meet wherever is convenient for the prospect

***LET'S PRACTICE!***

# Solicitation Meeting: The Opening

- **Thank You!** and connect
- Build interpersonal rapport
- Ask open ended questions. Get the prospect to talk about themselves, his/her needs and his/her motives. **Why is your organization meaningful to him/her? What is his/her story?**
- **LISTEN!** Your goal is 80% listening versus 20% talking!
- Sell yourself and others who are involved with you. **Tell your Story!**

# Solicitation Meeting: Presenting the Case

- **Educate** prospect about organization from his/her perspective. Tell the your organization's story.
- **Engage** the prospect. Tell about opportunities that might be of particular interest to the donor.
- **Demonstrate** that the organization is well-managed
- **Create urgency.** Why now? What will the funds allow the organization to do? What happens if you don't raise the funds?

# Solicitation Meeting: The Ask

- Know the ask amount
- Before you solicit others, make your own gift
- After presenting the case, “I hope you will join me in supporting this important work. Would you consider making a donation of \$X?”
- Once you have asked for the amount remain silent and stay **silent.**
- The next words **MUST** be those of the prospect. It will be the key as to how you proceed.

# Solicitation Meeting: The Negotiation

- **Excuses and objections** are natural and predictable
- **Acknowledge** what the prospect is saying
- **Address** the issue raised
- **Ask again** for a different amount

# Solicitation Meeting: The Closing

- **Always Be Closing!**
- Watch for closing clues such as impatience or excuses to end
- Restate the commitment
- Keep the ball in your court if any follow-up required

# After the Meeting

- Importance of reporting back outcome of meeting and information learned
- Follow-up
- Get over the finish line
- Documentation
- Development professional creates stewardship plan, along with Development Committee



# Takeaways

- Feel comfortable with your organization's mission and opportunities for engagement.
- Educate yourself about your prospect.
- Have a conversation. You already have a connection with the prospect.
- Seek to hear the prospect's story.
- Tell your story.
- Explain why now is a crucial time to invest in the your organization.
- ***Remember giving is an opportunity for people to express their values.***



Practice Makes Perfect

# The Annual Campaign – Loyal Donor, Increase

## **Donor: Janet Levinson**

**The Story:** Janet is 60 years old and a steady donor giving \$500 a year for the last 5 years. She was very involved when her kids were young and has served on a number of committees. Currently, she does not attend events regularly. Research shows that her maximum gift anywhere is \$5,000.

## **Your Assignment:**

You and Janet are meeting face to face and have already been schmoozing for 15 minutes, catching up on her family and what is going on with her. You have two minutes to transition to the “ask” and increase her annual support from \$500 to \$1,000. Your goal is to increase her annual gift.

# The Annual Campaign - Lapsed Donor

## **Donor: Jim Cohen**

**The Story:** Jim Cohen is a 40 year old local business owner. He has come to your organization's events (tickets are \$250) in the past when he has known one of the honorees. You recently ran into Jim on vacation and started talking about your involvement in your organization. You followed-up when you got home. You are now at a solicitation meeting with Jim a month later.

**Your Assignment:** Ask Jim to get involved with the organization in a volunteer capacity and ask Jim for an annual gift of \$360.

# The Campaign – New Donor

## **Donor: Kim Hirschfeld**

**The Story:** Kim is 53 years old. She and her family are longtime donors to many other organizations in the area. She recently attended an event and was impressed. Her gifts elsewhere average \$1,800 for annual campaigns and her family just pledged \$100,000 for a capital campaign. You have been chatting for 25 minutes and are now transitioning to the actual ask.

**Your Assignment:** Ask Kim for \$1,800. Let her know how her gift will make an impact (be specific) and how important it is to be part of the community. Remind her how vital leadership giving is and how it will spark others to give at her level.

# Reporting Out

- How did it feel to be the donor?
- How did it feel to be the solicitor?
- What worked well?
- What do you take away from this exercise?

A network diagram consisting of numerous small circular nodes connected by thin lines. The nodes are colored in two distinct groups: blue and red. The blue nodes are primarily located on the left side of the image, while the red nodes are concentrated on the right side. There is a central area where the two groups overlap, with some blue nodes connected to red nodes. The overall structure is a complex web of interconnected points, suggesting a social network or a data network. The background is a light, solid blue color.

# Q & A

# Action Items for Volunteers

- GIVE first
- BE a “door” for new prospects
- USE your elevator pitches and conversation starters
- Help DEVELOP cultivation strategies
- TELL your stories
- CREATE excitement/sense of need with supporters
- PRACTICE soliciting
- Leverage excitement/caring to BUILD relationships and STEWARD supporters

*"If you've just been asked to join your first board or you're on ten boards, Nanette Fridman has written the book for you. On Board tells you everything you need, from A to Z and then some—and it's so readable!"*  
*Peter Edelman, Professor of Law, Georgetown University Law Center*

# ON BOARD

WHAT CURRENT AND ASPIRING  
BOARD MEMBERS MUST KNOW ABOUT  
**NONPROFITS & BOARD SERVICE**



**NANETTE R. FRIDMAN**

Foreword by Aaron Philip Dworkin  
President, After-School All-Stars National Network

“Too often the expectations of board members and the workings of nonprofits have been vague or mysterious. Whether you are a professional or board member, On Board demystifies how nonprofits work and lays out in detail how board members can be responsible, effective and fulfilled.”

Dr. Marc N. Kramer  
Executive Director, RAVSAK

“Nanette Fridman insightfully shares her experience with nonprofit boards to help individuals be more intentional, engaged and clear about their roles. Every governance committee should give this book to their new and ongoing board members.”

Nancy K. Kaufman,  
Chief Executive Officer, NCJW



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*PLAN TO SUCCEED*