



Most Things You'd Like to Know about Fundraising

Part 3: Fighting the Fear

How to Make the Ask & Plan a Donor Visit

Housekeeping

- We are recording this!
- Please mute your mic and stay muted unless you would like to make a comment or ask a question at the end.
- Feel free to type questions into the chat box anytime.
 - We'll address these during the Q and A at the end.
- For those joining by phone, you can mute/unmute yourself by hitting “*6.”

Power Up Your Pantry

Power Up Your Pantry is a University of Missouri program intended for food pantries and other hunger relief groups looking for ways to enhance their current operations and better meet the needs of the people they serve.

Connect with us!

Website: foodsecurity.missouri.edu/power-up/

Facebook: <https://www.facebook.com/powerupyourpantry/>



Interdisciplinary Center
for Food Security



New Chapter Coaching, LLC

Our mission is to build a better world by increasing the effectiveness of nonprofit leaders and the impact of the organization they serve.

Our core services:

- Leadership Coaching
- Strategic Planning
- Strengths-Based Team Building
- Leadership Roundtables
- Executive Transition Management
- Facilitation of Retreats & Meetings
- Organizational Capacity Building Assessments

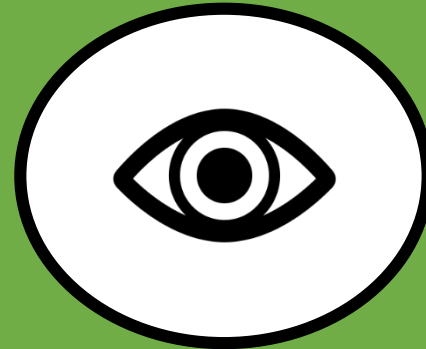


Jessica Macy
Senior Associate

What are our objectives?



**Define the
ABC's of Donors**



**Identify the step
of a donor visit**



**Determine what
you need to
support your ask**





What do you need to do fundraising?

Refresher from session #1

1. A reason – the mission
2. *A person – the asker/prospective donor*

Adapted from New Chapter Coaching Strategic Partner

Jaime Freidrichs

Who are our prospective donors?

Think about the
constituency circles
from session #2



Source: Hank Rosso - *Achieving Excellence in Fundraising*



Find donors...

...by asking board members and volunteers to refer friends and family.

...at your events.

...at partnering organizations.

...on your mailing and email lists.

...among your existing donors.

ABC's ...simple as 1,2,3

A person gives money to a specific organization because of:

Ability

Belief

Contact



To find donors, look for people who feel they have the ability to give and who believe in your organization.

Then, ASK!

HANG ON ...



Really?

It is not that easy!



What words do you think of when I say fundraising?

- Anxious
- Nervous
- Awkward
- Worried
- Fearful
- Intimidating
- Uncomfortable
- ANYONE ...excited????

ASKING IS TERRIFYING





Less Intimidating Because...

Your prospective donors have
*the **ability** to give and the*
***belief** in the work of and a*
***connection** to the organization.*

No Gorilla Fundraising

Be Clear ... Clear is Kind

(Brene Brown)

*The visit to ask for
support of
your organization.*





Prepping for Visit

- 1. Create a donor visit plan*
- 2. Figure out what documents
you need*
- 3. Practice*



Donor Visit Plan

Step One: Pre-visit work

- Board member & Staff meet to determine roles for a donor visit and to create a donor visit outline. This details:
 - what we know about the person
 - who is saying what in the visit
 - what\how much are we asking for

Get all of the information in one place using a donor visit outline (sample available after webinar)

Donor Visit Outline

Date of Visit: _____ Time of Visit: _____

Staff\Representative: _____

Person to be Visited: _____

Phone: _____ Email: _____

Meeting Place: _____ Address: _____

Goals of Meeting:

Why they like us:	
Why they should say yes:	
What are we asking for:	

Plan for meeting:

	Who is talking about what?
The Intro	
The Reason	
The Why	
The Ask	
Results of Interaction	

General Summary: _____

Follow-up Actions:

What to do	When	Date completed

Next Contact Dates: _____

Sent Meeting Thank You

Meeting Comments Entered into Database: _____

Donor Visit Plan

Step Two: Pre-visit work

- Assemble any materials you may need. Brochures, annual reports, photos, stories, etc.

CONTRIBUTOR INFORMATION	
First Name: _____	MI: _____ Last Name: _____
Mailing Address: _____	
City: _____	State: _____ Zip: _____
Home Phone: (____) _____	Work Phone: (____) _____
E-mail Address: _____	
Name as it is to appear in acknowledgement material: _____	
<input type="checkbox"/> I would prefer that this contribution <u>and/or</u> my name be kept confidential.	
DONATION INFORMATION	
A ONE-TIME DONATION, IN THE AMOUNT OF:	
<input type="checkbox"/> \$1,200 <input type="checkbox"/> \$850 <input type="checkbox"/> \$700 <input type="checkbox"/> \$300 <input type="checkbox"/> \$100 <input type="checkbox"/> Other: \$ _____	
A REPEATING DONATION, AS FOLLOWS:	
A sum of \$ _____ Once Every <input type="checkbox"/> Month <input type="checkbox"/> Quarter <input type="checkbox"/> Year, Amounting to a Total of \$ _____	
Signature: _____	
METHOD OF PAYMENT	
<input type="checkbox"/> Check enclosed. Please make checks payable to ABC ORG	
<input type="checkbox"/> Please bill my credit card: Card type: Visa MasterCard	
Name as appears on card: _____	
Account number: _____	
Expiration Date: _____ Verification code (on back) _____	
<input type="checkbox"/> Contact me	
NOTES	
Contributions to the Boone County Council on Aging are deemed charitable under section 501(a) of the internal revenue code as an organization described in Section 501(c)(3), U.S. Federal Tax ID 43-1111167. Please consult your accountant for any clarifications. Payments must be postmarked before the end of the year to be eligible for a tax deduction in that year. For more information please visit www.BooneAging.org , call 573.443.111, or write to jessica.macy@BooneAging.org	
Please forward completed form and payment to: ABC ORG 1123 Main Street Anywhere, MO 12345	

Donations In Action

\$25 provides a staff person to take 8 seniors to the doctor or pharmacy



\$45 helps us provide a volunteer to take a senior grocery shopping or to the food bank



\$75 provides a volunteer to friendly visit with a senior once a week



\$100 provides a staff person to drive a senior to two doctors' appointments, wait with them, and provide follow up after the visit to increase health literacy.

\$300 provides a volunteer to help two seniors with yard work throughout the year

\$700 is the average cost for BCCA to provide services to a senior for one year

\$850 is the average amount a senior spends on disposable undergarments



\$1,200 is the cost for a senior to drink 3 nutritional shakes a day to improve their nutrition

Donor Visit Plan

- Step Three: Pre-visit work
 - Call or email to set up a visit
 - It is fine to work from a script





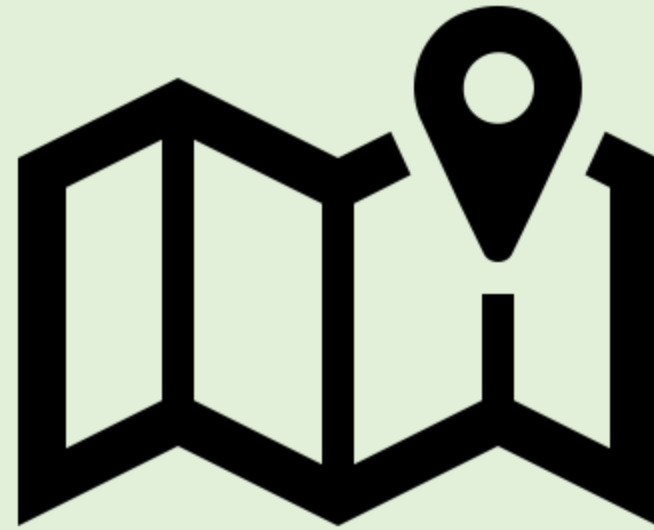
Phone call or email

*The goal is to get a VISIT
...not an appointment or a
meeting!*

Donor Visit Plan

THE VISIT

1. Introductions
2. The Reason
3. The Why
4. **The Ask**
5. The Thank You!



The Reason & The Why

- The Reason
 - Board member shares their reason, why they got involved, or why this matters to them. **Use storytelling!**
- The Why
 - Staff person ask what the donor knows about the organization and why they are interested.
 - BE INTERESTED, not interesting!
 - LISTEN carefully
 - Staff then shares with the donor:
 - Information about the organization
 - What problem our community is facing
 - How we are solving that problem

Tell donors about:

- The WHO ...who you serve
- The WHAT ...what is the need
- The HOW...how their dollars will be used, the impact
- (Optional) The When...How long the donation will last, the campaign cycle, or when you can get back in touch with them – not asking for money!





THE ASK

Tips

1. Ask for a specific amount
2. **STOP TALKING**
3. Wait for the donor to respond



THE ASK

If it is a NO

- Ask open ended questions to get to the point of why they cannot give
- Address questions or concerns
- Offer other opportunities – volunteering and advocacy



THE ASK

If it is a YES

- TAKE A DEEP BREATH!
- Secure a pledge Have donor fill out pledge form or write the check right now
- If they don't write a check on the spot set specific follow up date

Thank before you BANK!

Within 72 hours,
make a personal thank you call or
send a thank you note.



The pen is mightier than
the sword, but the tongue
is mightier than them
both put together.

-Marcus Garvey

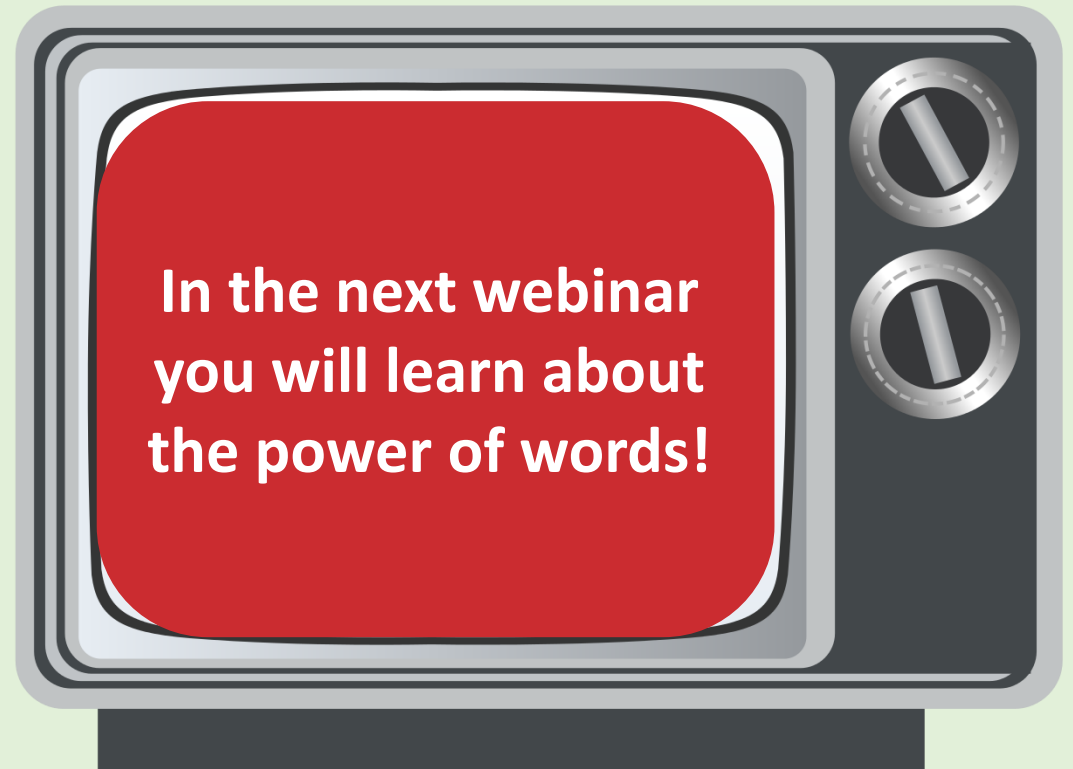


Fundraising secrets of success

To give donors the chance to change the world, you must:

1. Know the mission of the organization
2. Know what you are asking for
3. ASK!
4. Thank donors.

Words are powerful in more than just gratitude. They can help you raise money!
STAY TUNED ...

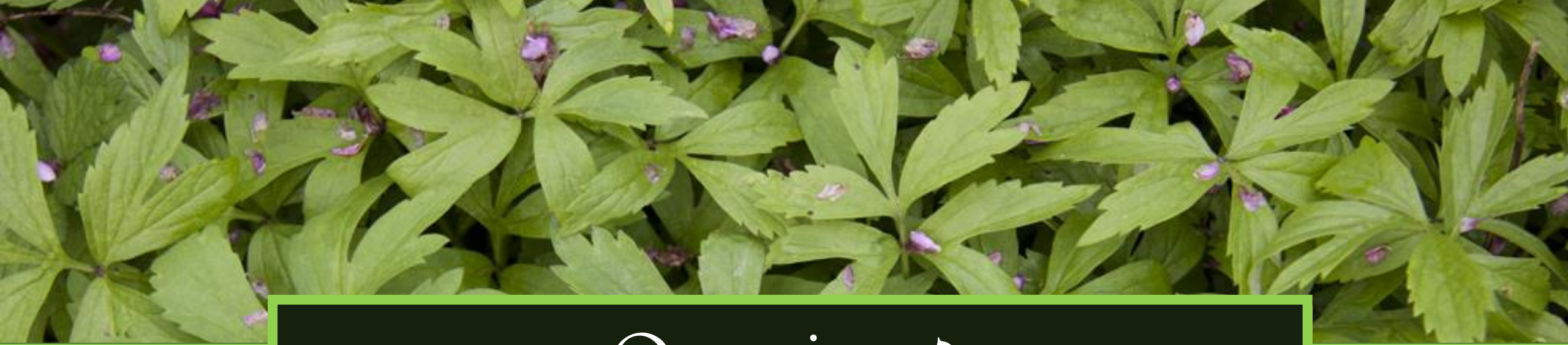


**In the next webinar
you will learn about
the power of words!**



Resources

- Association of Fund Raising Professionals
- Council for Nonprofits (website)
- Joan Garry – joangarry.com (website, book, blog and podcast)
- BoardSource (website)
- Fired Up Fund Raising – Gail Perry (website and book)
- Classy (website)
- Free Management Library (website)
- Nonprofit Fundraising 101: A Practical Guide With Easy to Implement Ideas & Tips from Industry Experts (book - \$30 on amazon)



Questions?



Next in the series...

- Wednesday, February 13: Fighting The Fear – How To Ask And Make A Donor Visit
- Wednesday, February 27: The Power Of Words – How To Craft A Good Fund Raising Letter And Thank You Letters
- Wednesday, March 13: It Takes More Than One Person - How To Engage Board And Other Volunteers In Fund Raising and How to Effectively Track Donors

Thank you for joining us!

GET INVOLVED



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DOWNLOAD “POWER UP YOUR PANTRY” GUIDE SHEETS FOR FREE AT: [FOODSECURITY.MISSOURI.EDU/POWER-UP/](https://foodsecurity.missouri.edu/power-up/)



CONTACT US FOR QUESTIONS OR INPUT. WE APPRECIATE THE FEEDBACK!

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Interdisciplinary Center
for Food Security