

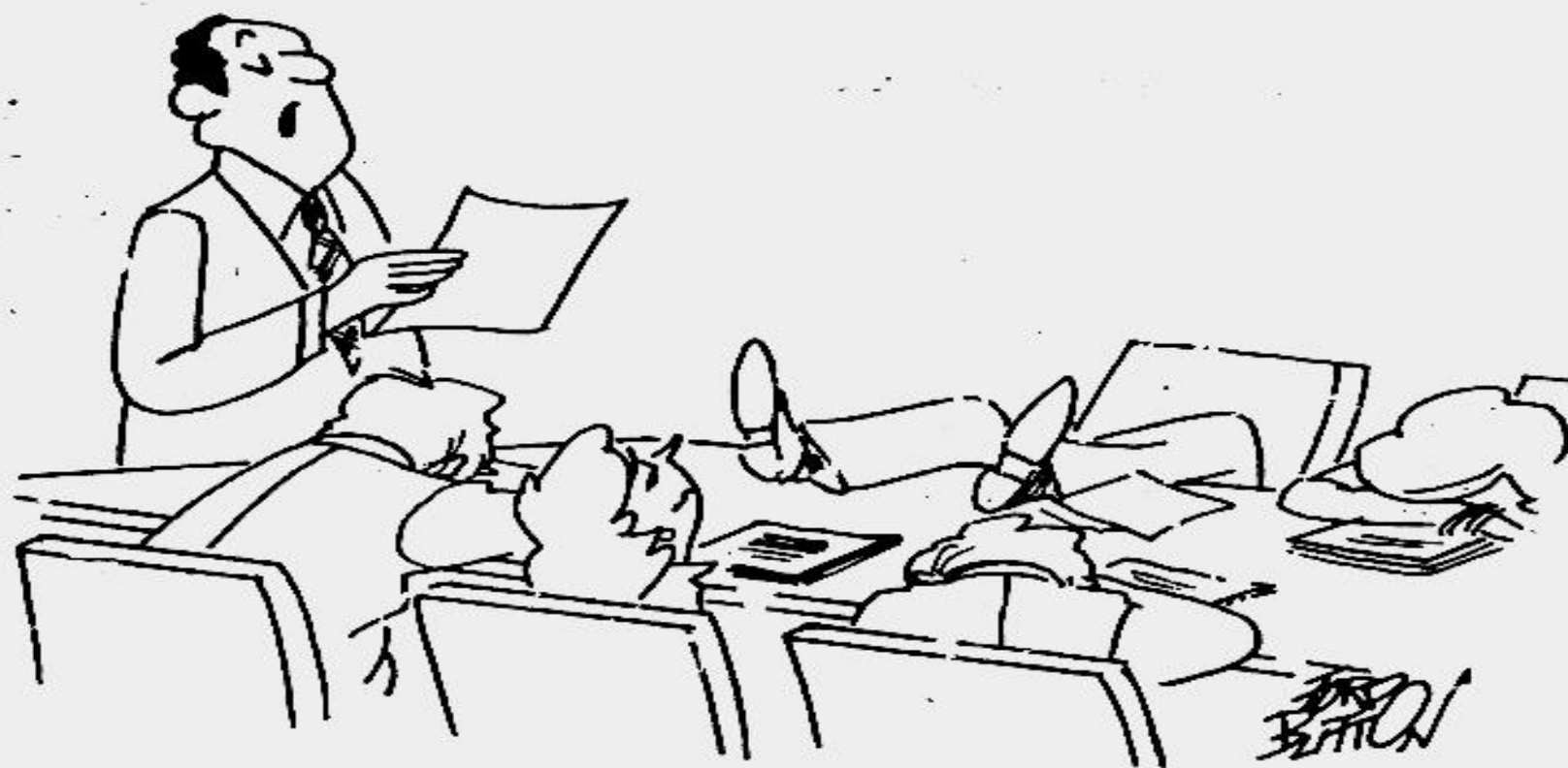


Community Foundation Sonoma County

Creating Confident Askers on Your Board
February 23, 2011
Kay Sprinkel Grace, Presenter

Agenda

- Participant expectations
- Quick review of basic concepts that guide successful development and fund raising
- Review your current fundraising approaches
- Reviewing the elements of the solicitation
 - Handling objections
 - Getting to yes
 - Freeze Frame demonstration
- Questions



***"I welcome you to the 283rd meeting of the
Society for Innovation in Fund Raising."***

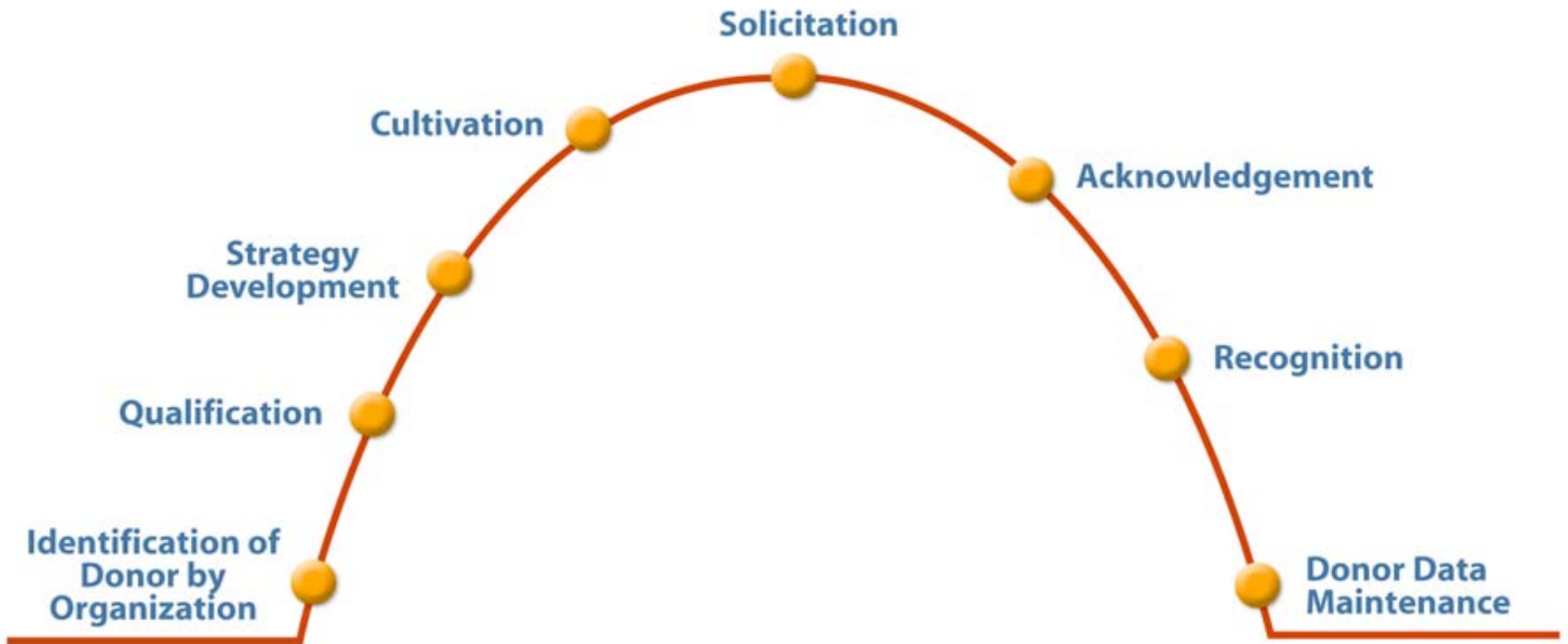
The True Innovation

- An innovation in attitude
 - All philanthropy is based in shared values
 - People give because you meet needs, not because you have needs
 - A gift to you is really a gift through you into the community
 - All statistics must be substantiated by impact: learn to tell stories (Jim Collins)
 - All donors are really donor-investors – they are looking for a “return”
 - Fund raising is not about money, it is about relationships: if you build them, the money will come

What Donors Seek: Does Your Strategy Match This?

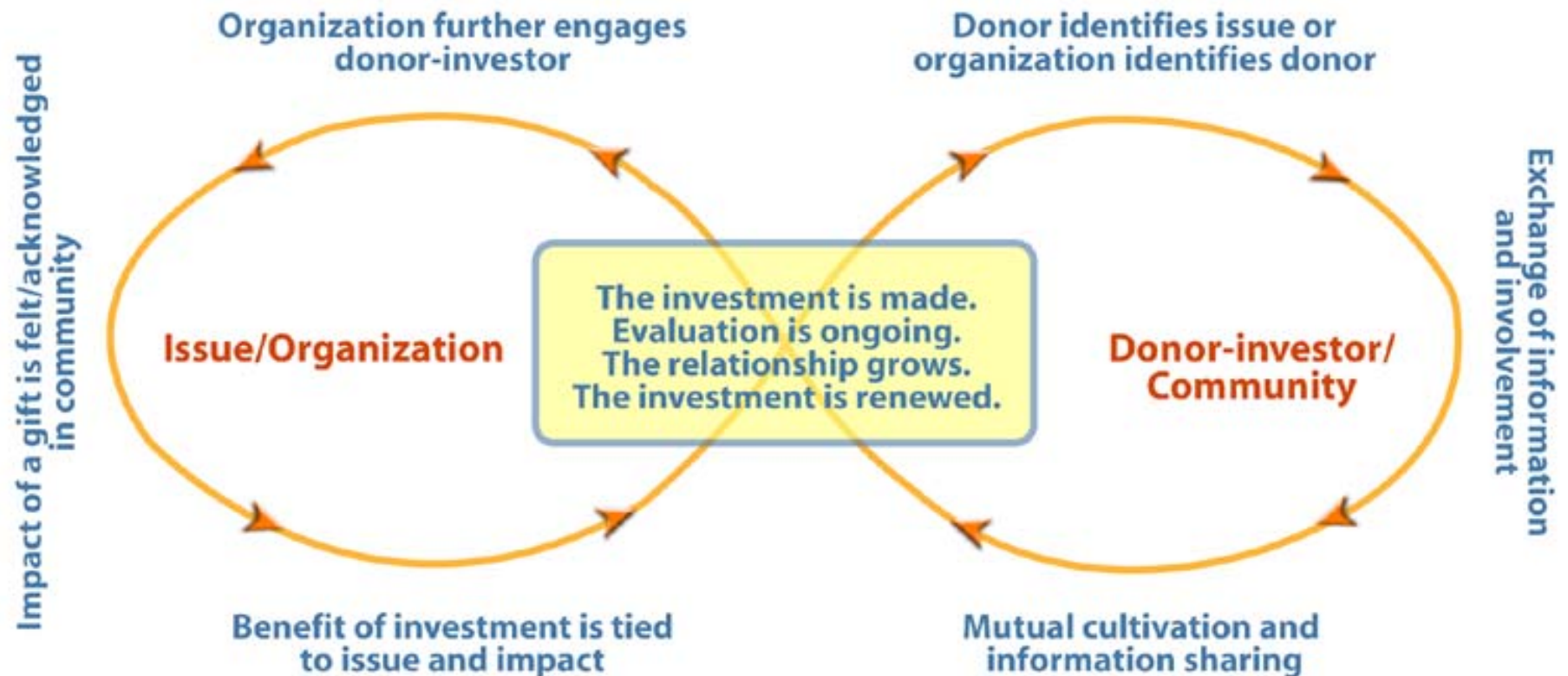
- Issues: what are they?
- Ideas: what difference will their investment make?
- Involvement: what are you offering them?
- Impact: what difference are you making?
- Investment: what will be their “return?”
 - Kay Sprinkel Grace and Alan Wendroff, 2001
 - High Impact Philanthropy (John Wiley & Sons)

Transactional Bell Curve: The Way We Have Asked in the Past



High Impact Philanthropy
Kay Sprinkel Grace, Alan Wendroff

Transformational Infinity Loop: The Way We Need to Do It Now



High Impact Philanthropy
Kay Sprinkel Grace, Alan Wendroff



What Approaches Do You Use?

How are they working?

Cultivation

The Beginning of the Investor
Relationship:
More Than Random Acts of
Kindness



Key Cultivation Principles

- Most important step: if people are not engaged, they will not give as generously
- The purpose of cultivation is to build or strengthen relationships with prospects and donors: Connection, Concern, Capacity
- Cultivation is strategic, not random
- You all have resources for cultivation: your imagination is the only limitation



Key Cultivation Principles

- Cultivation is about the donor's needs and interests more than it is about yours
- This is where you need to engage the full development team (staff, volunteer committee members, others)
- Getting information to staff and into the data base from cultivation interaction with potential and current donors is critical

Key Cultivation Principles - 2

- Cultivation activities offer personal interaction, opportunities for feedback and conversation, and allow you to see the person's reaction or enthusiasm to an idea or proposal
- There are other ways we cultivate as well: events and gatherings, web site, newsletters, email updates/alerts, Facebook, Twitter, etc.
- It is prudent, effective and cuts costs to combine cultivation and stewardship activities
- Social media have allowed us many more opportunities for cultivation at lower cost

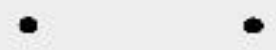


Strategic Cultivation Management

- Role of intuition
 - Let your intuition guide you – often you will “sense” when a person is ready
- Role of volunteers
 - You are the key people for cultivation – offering your time, testimonials and enthusiasm
- Role of staff
 - The full development team: leadership and other professional staff need to be informed and involved relative to cultivation activities



“Trust me, Mort—no electronic-communications superhighway, no matter how vast and sophisticated, will ever replace the art of the schmooze.”



Making the Ask

Up Close and Personal
A Review of What Works

Key Points in the Solicitation

- Team of two meeting with one or two prospects is the best (face to face)
- Convenient/comfortable time and place
- Donor-centered process (listen, question, handle objections)
- A four-part process: Opening, Involvement, Presentation, Close
- Tips and techniques

Elements of the Ask

- Opening
 - Chit chat, but keep to the purpose of the visit and keep it brief
- Involvement
 - Open ended questions, two ears and one mouth rule, allow them to talk about themselves and their involvement in your organization

Elements of the Ask - 2

- Presentation
 - FBQ (features, benefits, questions) about the impact of keeping your organization strong now and for the future
- Close
 - Ask for a specific amount, be silent after the close, confirm how the gift will be made or what follow up is needed if the person needs to think about their gift

Also Remember....

- Body language
 - Be sure your words and your body are aligned
- Eye contact
 - Key to engagement
- CLASP techniques
 - Clarify, Link, Acknowledge, Summarize, Pace
- The importance of going in twos
 - Even the donor likes it better; be sure to rehearse and let the donor who is coming

Recognizing Levels of Resistance

With all objections, meet, don't beat

- Misunderstanding
 - Antidote: facts
- Skepticism
 - Antidote: third person
- Real Drawback
 - Antidote: listen with understanding
- Indifference
 - Antidote: finding the reason



Closing the Ask

- Specific amount, always
- Keep silent after the close
- Dealing with the answer:
 - Yes
 - No
 - Maybe

Model Solicitation

Freeze Frame Exercise

Stewardship

Once you have the gift, the
real work (and joy) begins

Transformational Infinity Loop: Basis of Stewardship

1. You Make Your Case

2. You Tailor Your Case



3. Donor-Investors Champion Your Case

High Impact Philanthropy
Kay Sprinkel Grace, Alan Wendroff



Follow Up and Acknowledgement: Paving the Way for a Relationship

- The speed, accuracy, thought and personalization of the follow up (for information, to talk to someone else) and the acknowledgement (letter, phone, card, email) are the beginnings of stewardship.
- If these steps are not done well, you can negate the impact of the asking process and derail stewardship before it takes hold
- You cannot build relationships without understanding how much people want to be acknowledged and appreciated

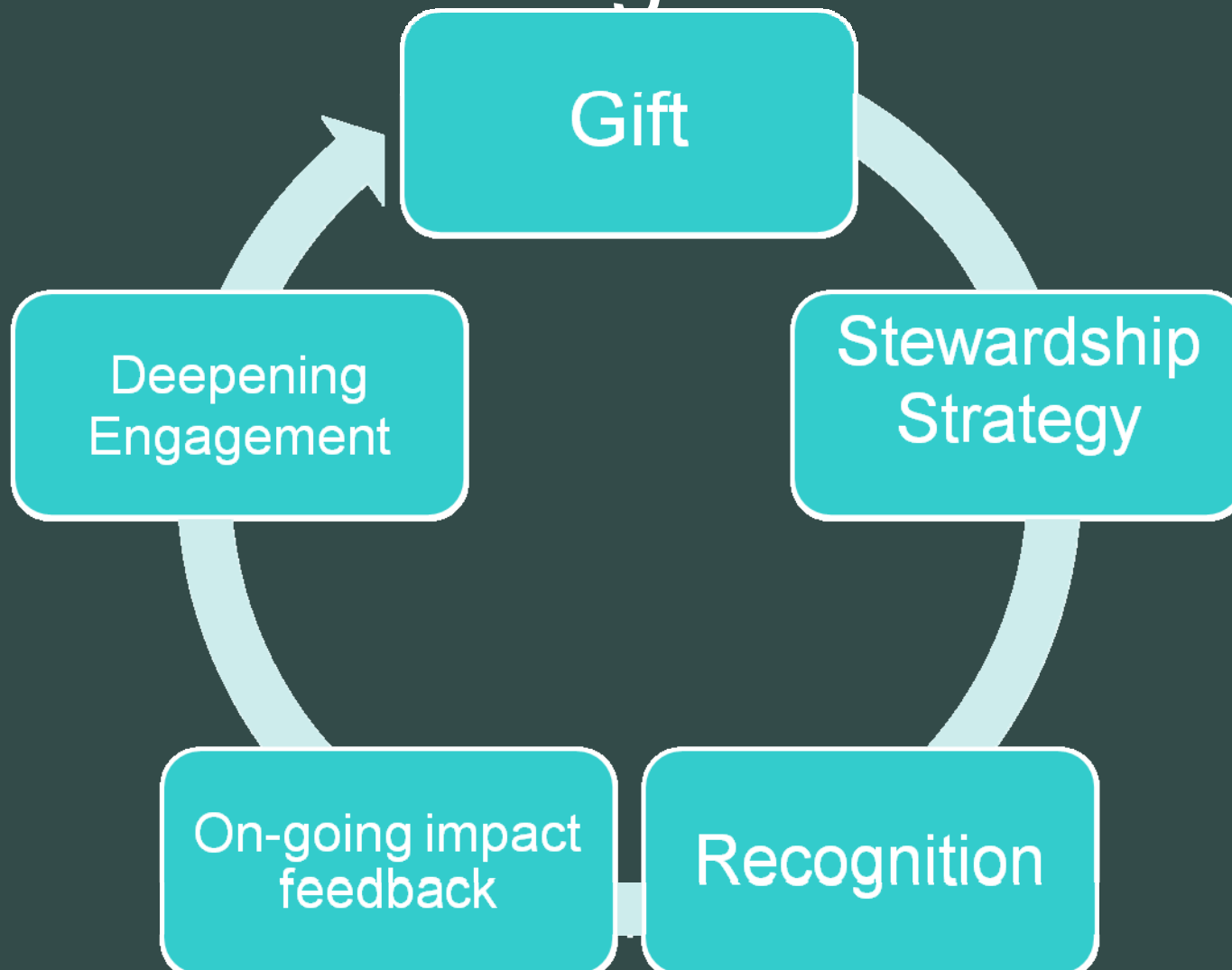
Levels of Stewardship

3. Special treatment and opportunities appropriate to level of gift

2. Appropriate and consistent recognition, communication and opportunities for involvement

1. Accuracy in donor records, timely response, noting donor's interest(s)

Stewardship Cycle: Is Yours Working?



How We Inspire Others Through Personal Asks

- “It's not just about being able to write a check. It's being able to touch somebody's life.”
- *Oprah Winfrey*

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