Leave A Legacy® York County

A Program of the York County Bar Foundation

How to Get Donor Visits & Knock Them Out of the Park

productive FUNDRAISING

@fundraiserchad

DICKINSON
COLLEGE

Coachclass
82670

HOURS
PUMA

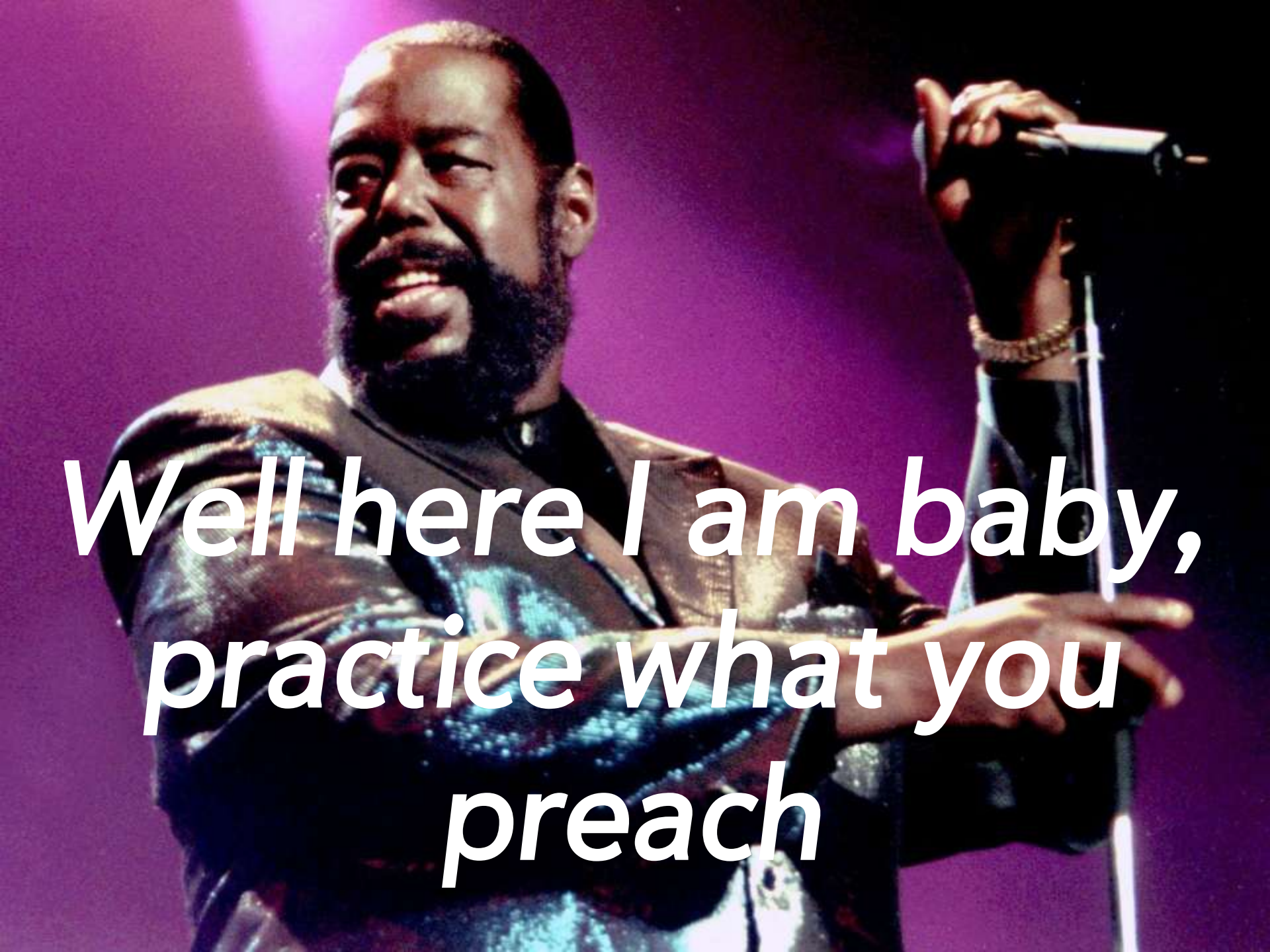
Who is this guy?

And why does he think he knows what he's talking about?

career fundraiser

CFRE™

providing fundraising strategy, training & coaching to small nonprofit organizations


Well here I am baby,
practice what you
preach

AGENDA

1) Prioritizing Donor Visits
2) What is an Ask?
3) Deciding Who to Meet With
4) Getting the Visit
5) Guiding the Conversation
6) The Transition
7) Positioning the Ask
8) Closing the Meeting
9) Following Up
10) Q&A

slides?

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Prioritizing Donor Visits

set a visit goal

block time for visits

(2 hours incl travel)

block time for scheduling visits

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What is an Ask?

ASKING is not what you think it is …

Begging=you have the power

Demanding=I have the power

Asking=we have a relationship

@amandapalmer #IFC2016

“The Art of Asking”

The focus should not be on the ASK, it should be on the CONNECTION.

It's not how do we ASK people to give, it's how do we LET people give. It's an INVITATION.

What's the best way to extend that invitation?

PEOPLE GIVE TO PEOPLE
(NOT EMAILS)

Not every visit has an ask (especially not first time visits).

Not all asks are for money.

deciding who to meet with

Hello
my name is
FLUFFY

from your database

Top Factors for Identifying a Good Major Gift Prospect

- Donor-Nonprofit Connections
  - Past donations (RFM)
    - Recency of giving
    - Frequency of giving
    - Monetary amount
  - Volunteerism
    - Multiple capacities
    - Leadership levels
  - Former service recipients
    - Alumni
    - Grateful patients
- Research
  - High net worth (wealth screening)
  - Support of related charities
    - $100,000 = 32x
    - $5,000 = 5x
  - Political giving
    - $2,500 = 14x
    - $500 = 5x
  - Property ownership
    - $2M+ = 17x
    - $1M+ = 4x
    - $750k+ = 2x

record everything & become a query master

Credit: DonorSearch

from existing donors

Donor Profile

- Attribute 1
- Attribute 2
- Attribute 3

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getting the visit

Dear Mr. Donor -

I hope all is well and that you're enjoying these late spring days!

My name is Chad Barger and I am the Development Director of the ABC Charity.

I am writing to see if I could stop by sometime in the next month or so to provide a **brief** update on ABC Charity. I like to do this with as many of our supporters as possible each year. It's an opportunity for me to share our progress, to answer your questions and to **get some feedback** which is always appreciated.

I think **20 minutes** would be sufficient – is there a good day on your calendar? **What about the 20th at 2pm or the 22nd between 1 and 4pm?**

Also, please know that while it is my hope that you will continue supporting our cause, at this time I'd just like to meet you and provide this update – **I will not be asking for any money!**

Thank you for

Sincerely, Cha

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Different Approaches for Different Relationships

- A close friend
- An acquaintance
- Someone you don't know (insert the connection)

guiding the conversation

This is
My Story...

the most powerful form of communicating with another human being is asking them a question

Ask
open-ended
questions

FIND CPI
(common points of interest)
Small talk
KNOW | LIKE | TRUST

the transition

WE INTERRUPT THIS PROGRAM FOR A
COMMERCIAL BREAK

@fundraiserchad

Your trusted guide to the fundraising tactics and products that are working today

---

the transition

Chad's Favorite Donor Visit Questions

So, as you know I wanted to speak about ABC Charity today ...

- What do you know about us?
- What first led you to become involved with our organization?
- What excites you about our current programming?
- What could we be doing better?

A FEW
key talking points

positioning the ask

no asks on
first visits with
people you don't
already know well

The easiest way to make an ASK ...

CONSIDER &

JOIN ME

“I hope you’ll CONSIDER JOINING ME in supporting this program with a donation of $5,000.”

“I hope you’ll CONSIDER JOINING ME in advancing this program by serving on the task force.”

closing the meeting

Small talk
KNOW | LIKE | TRUST

GET PERMISSION

What's Next?

1. More information
2. Proposal / offer
3. Follow up call / meeting

GET PERMISSION AT THE MEETING

following up

But what do you need to do before you follow up with your planned next step?

Thank you ...

The 3 Minute / 3 Sentence Thank You Note Formula

sentence 1 = what you saw / what happened

sentence 2 = the impact of what you saw on you or your organization

sent productivefundraising.com/resources the

VANCE -

THANKS AGAIN FOR TAKING THE TIME TO MEET WITH ME THIS WEEK. I'M CONFIDENT THAT BY WORKING TOGETHER WE CAN BOTH INCREASE OUR IMPACT ON THE LOCAL ARTS SCENE. I GREATLY APPRECIATE YOUR DEDICATION TO THE CAUSE!

THANKS AGAIN,

CHAD

CULTURAL
ENRICHMENT
FUND

Follow up guidelines: 4x

1 week after the ask
2 weeks after that
4 weeks after that

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The End!

further learning

@fundraiserchad

4/25 @ 12pm (eastern)

questions

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