

THE 25 GOLDEN RULES OF FACE-TO-FACE FUND RAISING: A WORKSHEET

Based upon the book *Asking:
A 59-Minute Guide to Everything Board Members, Volunteers and Staff Must Know
to Secure the Gift* by Jerold Panas. Emerson & Church. 2002.

PART ONE – THE BASICS:

1. Begin by knowing everything possible about the institution, its mission and vision for the future, its program and the project.
2. Make certain in your heart-of-hearts that you're completely committed to the worthiness of the organization and the significance and value of the project.
3. Learn everything you can about the prospects you'll be calling on and their giving history.
4. After careful assessment, determine the specific amount you should ask for.
5. Give some thought as to how you'll express the amount of your request. Say it out loud several times before your visit.
6. Setting up the visit is 85% of getting the gift. When doing so, don't make the case or try to get the gift on the phone.
7. Practice, practice, practice. Write out what you're going to say when you call for the visit.
8. Write out in advance all of the reasons your prospects may try to put you off. Practice how to respond.
9. When you make the visit, go in pairs.
10. Call on your best prospects first.
11. Remember what's important to the donors you call on: Empathy, Energy and Enthusiasm.

12. During the visit, use your early moments to establish rapport. Take as much time as necessary. But remember, your objective is to talk about the project and to get the gift.
13. Probe for concerns your prospect may have about the organization. Acknowledge them as appropriate, reminding the prospect of all the important work the organization does.
14. Ask open questions. (Avoid those that can be answered by yes or no.)
15. LISTEN, LISTEN, LISTEN.
16. Take no more than 11 minutes to present the project and its irrefutable rationale.
17. The case for the project has to be relevant, have a dramatic and emotional appeal, and provide a sense of urgency.
18. Convey the benefit to the donor. It has to be a win-win for the institution and the donor.
19. Don't let the size of the gift dominate the presentation. It's all about mission – not money.
20. Don't sell features. Talk about outcomes and results, how the project will change lives.
21. Give testimony to your own gift and what others have done.
22. When finally making the ask, use words such as "I would like you to consider a gift of _____."
23. Wait for a response. Don't fill in the silence – no matter how long it seems to take.
24. Don't let objections rattle you. They are your best friends. They let you know how the prospect really feels about the program. If your request is rejected, use the Four Magic Questions: *Is it the Organization? Is it the Project? Is it the Amount? Is it the Timing?*

25. Get a commitment to something before leaving, either the gift or a date for another visit.

PART TWO – QUESTIONS TO ASK YOURSELF BEFORE YOU CALL:

We strongly suggest you write out your answers.

- **Which among these suggestions are most compelling for you? Why?**
- **What makes you most uncomfortable about asking for a gift?**
- **What action step will you now take to overcome your discomfort?**
- **With which donor or prospect do you think you will have the best chance of success in your next attempt to ask for a major gift?**
- **How will you know when this person is ready to be asked and will you then make a commitment to make an appointment to see this person?**
- **Whom will you take with you for the solicitation and why?**
- **Whatever the response to your ask, what will your next steps be?**