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# WHAT? ME FUNDRAISE?

Boards and the “F” Word



# What constitutes “fundraising”?

- Let’s unpack that
- It’s not just asking for money
- But that is the hard part so we’ll spend some time on making it easier

# Fundraising is a process

Figure out who.

Figure who they are and what makes them tick.

Who will and how will you ask?

Thank them for the gift and build the relationship.

# Getting to the Who

- Board members can help by
  - *Letting their friends know they support you*
  - *Inviting their friends to your events, programs, etc.*
  - *Letting staff know when there is someone new or special you would like to introduce to the organization*
  - *Hosting small functions to introduce others to your organization*

*Is this fundraising?*

# Getting to know them

- There are many paths here.
  - *What interests them?*
  - *What connections do you see with their life and your organization?*
- Here are some possibilities:
  - *Send an article you believe might interest them that ties to the organization.*
  - *Offer a behind-the-scenes tour.*
  - *Ask them to volunteer for something short-term with your organization.*
  - *Utilize your organization's facility to host a meeting to which they are invited.*

*Is this fundraising?*

# Now let's talk about the asking part.

- This is what causes some board members to grit their teeth.
- Asking is hard.
- Pull out your phones and go to [www.askingmatters.com](http://www.askingmatters.com).
- Take the survey. Yes, you have to give them your email address.
- If you don't want to take the survey, check your email for a minute . You'll probably recognize yourself in one of the descriptions

# Brian Saber's Asking Styles





# Rainmaker

## ■ Strengths

- *Analytical extrovert*
- *Gathers info and analyzes it to inform decisions*
- *Strategic from start to finish*
- *Focuses on goals and outcomes*
- *Draws energy from others and views developing relationships as important*
- *A natural salesperson*
- *Enjoys succeeding in a field so full of resistance*
- *Handles rejection well*

# Rainmaker

- Challenges
  - *Can be too systematic and methodical*
  - *Not necessarily a good listener or observer*
  - *Can be impatient*
  - *Can talk too much*

# Go-Getter

- Strengths

- *Big Picture person; focuses on the vision*
- *High energy; courageous*
- *Intuitive and creative*
- *Quick and fluid thinker*
- *Engaging; good social skills; people are drawn to*
- *Natural curiosity about others*

# Go-Getter

- Challenges

- *Sometimes acts on intuition more than facts*
- *Sometimes asks when shouldn't*
- *Not that great a listener*
- *Talks too much*
- *Struggles to prepare and plan fully*

# Mission Controller

- Strengths
  - *Always prepared*
  - *Good listener and observer*
  - *Quietly gets the job done step by step*
  - *Systematic and methodical*
  - *Good thinker*

# Mission Controller

- Challenges
  - *“thinks” he isn’t prepared enough*
    - Ready, aim, aim, aim, aim, aim . . .
  - *May get caught up in the details*
  - *Can struggle to bond with others*

# Kindred Spirit

- Strengths
  - *Connects with people*
  - *Good listener*
  - *Natural ability to think things through*
  - *Considerate of others*
  - *Intuitive*

# Kindred Spirit

## ■ Challenges

- *May not speak up when it would be helpful*
- *Finds it hard to ask for money*
- *Finds it hard to hear “no” without taking it personally*
- *May avoid meeting new people*
- *Avoids large social situations*



# What makes them tick?

- Socrates said, “Know thyself” – but that’s just half the battle.
- What about the person you’re asking?
- *The Seven Faces of Philanthropy*
  - *Devout*
  - *Altruist*
  - *Communitarian*
  - *Socialite*
  - *Repayer*
  - *Investor*
  - *Dynast*

# Common Sense

- You have a sense of what type of asker you are
- You have an idea of what type of philanthropist your person might be
- So much of how to proceed is common sense and good manners
  - *Make an appointment and be on time.*
  - *Take the right person, but don't "gang up."*
  - *Be respectful of the time committed.*
  - *Invite them to talk.*
  - *Listen.*
  - *If you say you will do something, do it when you said you would.*
  - *Ask if it seems appropriate. Hold your fire if you should.*

# More common sense

- Ask in person if at all possible.
- According to Jerry Panas, if you have honestly asked for the appointment and you've been granted it, there is an 85% chance of getting the gift.
  - *It may take more than one appointment.*
  - *Work to get that appointment rather than talking about it on the phone or sending material.*

# More common sense

- Be prepared
  - *Expect to be asked how and at what level you are supporting.*
  - *Expect to be asked if everyone on the board has contributed.*
  - *Expect to know the time frame for fulfilling gift commitments.*
  - *Be able to talk about your project without reading to them.*
  - *Be able to discuss alternatives.*

# More common sense

- Be yourself
  - *If you are the wrong person, send someone else.*
  - *Know yourself.*
    - If you tend to run late, make yourself arrive early.
    - If you tend to dress down and your person is a suit-and-tie person, dress to match his attire.
    - If you tend to talk too much, talk to yourself before you go about listening.

# The “ask” has been made

- And a gift may be given
- Of course, this is fundraising. But it is just a piece of the process.

# The gift has been given

- But you aren't finished.
- A prompt thank you from those who asked is in order.
- A thank you phone call from the Board president or another board member would be fine.
- This is different from the official, tax-language letter the organization will send.
- Six months after the gift, let the donor know that the gift is working and thank them again.
- Accord whatever recognition is expected and desired.
- Invite the donor to future functions and get to know him.

*Is this fundraising?*

# You know more about yourself now

- You know to think about the person you're asking.
- You know that fundraising is a process.
- If you are not an asker, you should have come up with other pieces of the fundraising process you can be comfortable with.
- The next time your board discusses fundraising activities,
  - *volunteer to compile a list*
  - *get two new volunteers*
  - *host something in your home*
  - *write a profile of a donor for the newsletter*

*It all counts. And it is all fundraising.*



“Fundraising” doesn’t have to be a bad word.

Relax, be yourself, engage with the pieces you’re good at and comfortable with.

Go fundraise.

- Judi Smith, CFRE

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