

# HOW TO SOLICIT A GIFT

## WEBINAR



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# REQUEST THE GIFT:

1. A request for financial support requires great preparation.
2. Set the appointment in an environment where the support feels comfortable.
3. A solicitor who injects a high degree of pressure usually fails and often destroys potential for future success.
4. Stay within 30 minutes...Don't talk yourself out of a gift!

## Begin by **thanking** the donor for past support:

- Take an aggregate receipt
- Give and hold the receipt
- Look them in the eye when they tug
- Thank them for their past gifts

# Explain the current **need**:

- What is the need you seek to address?
- Give them your proposal
- Explain how this need affects the lives of those you seek to help
- Answer the question, "*What will happen if we don't help them?*"
- Lay out the need in clear, concise and emotional language

## THE REQUEST FOR A GIFT:

Look the donor in the **eye**,  
but remember you are asking for  
something **important**,  
and proceed with **care and gentleness**.

# Will you **help**?

- Do you show a range of gifts?
- A specific dollar amount?

***"I don't know your financial situation."***

***"I know you have many obligations and don't know what funds you have available."***

***"But, I know that the need is great  
and that you care about those whose  
lives are in need."***

***"We have a plan to  
provide excellence in  
healthcare."***

***"We need your help to achieve this important goal."***

*"Would you consider helping us provide the  
excellence in healthcare?"*

**Pause, let them think about it  
before they answer.**

*“Would you consider helping us by making a gift for this effort?”*

**Example if you are using ranges:**

*“Here are the number of gifts we need at the various gift levels. We need you to give as much as you can to help us achieve our goal.”*

***“I am sharing a written proposal  
for your consideration.”***

***“While you consider this proposal, I have a couple of suggestions for you to consider:***

- 1. Is there someone you would like to honor or memorialize someone with this gift?”***

***“And, 2 would it be helpful to you to gift appreciated assets with low basis?”***

**Pause – let them think.**

***“Would you be able to make this gift before  
December 31?”***

**Pause – let them speak.**

***If they say yes then say,  
"I will send a letter to you to confirm  
today's conversation."***

# What if they say, “no”?

1. Let them know you understand
2. Ask, *“Do you mind if I ask why?”*
  - There may be a number of reasons
3. Reply with, *“Thank you for letting me know. Do you mind if I stay in touch with you?”*
4. It’s important to leave with a relationship, even if you don’t get a gift
5. Ask yourself, *“Is it time to move on from this donor?”*

***"Do you know of other like-minded individuals who would want to help?"***

**Be ready to write.**

# Follow-up

1. Letter to confirm within 48 hours.
2. Make notes on your tickler file.

**Understand that donors want you to **succeed.****

**Don't oversell your project or institution.**

**Be concise.**

*(Making your presentation too long is deadly).*

**Be specific.**

*(Do they know what you are asking them  
to do and why?)*

**Make sure the donor understands  
what the next step is and who is  
going to take it.**

**Don't be embarrassed to ask  
donors to help someone who is in  
trouble.**

**Knowing that you are helping  
people in need should help you  
overcome your fear of being  
rejected.**

**Remember,  
you are not asking for yourself.**

***"We will also send you a copy of various fundraising letters throughout this year.***

***They are letters sent to our annual donors.***

***We just want you to see our message and we would appreciate any ideas on how to make our message clearer and more concise."***

# **Colombo Moment While at the Door:**

**Shake their hand(s) and look them in the eyes –**

***"(Their Name), thank you for letting me share with you our dream of helping those in need.***

***I want to thank you on their behalf for your care and concern.***

***I will make sure that every dime is spent according to your wishes and that not one cent is wasted.***

***I will report back to you on the results of our efforts by (DATE). Thank you again! I appreciate your support."***

# Follow-up

1. Letter to confirm within 48 hours.
2. Make notes on your tickler file.

# TAKEAWAYS

1. Ask in person
2. Written proposal
3. Ask – Pause: Let them think
4. Know when to close
5. If they say no – leave with a relationship
6. If they say yes – what are the next steps
7. If they say maybe – softly find out the roadblock
8. Send handwritten note
9. Something will happen, so be flexible
10. Is it time to move on from a donor?

**Understand that donors want you to **succeed!****

**QUESTIONS?**