

Creating an Annual Fund Campaign

November 5 & 6, 2013

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Sample Outline for ASK Visit

1. Explore knowledge and interest using open-ended questions throughout the visit:
 - Why do you support (our organization)?
 - Tell me more. OR Tell me the whole story.
 - What do you think about the work of (our organization)?
 - What in particular do you find most interesting? promising? effective?
 - What are you most concerned about that (our organization) is addressing?
 - What would happen if....? (these services were not available, etc.)
2. Describe ROI [results/outcomes/impact] of your organization's work
 - Tell a story
 - Describe unique role organization has played and positive impact on people/community
3. Describe project/need/campaign including key objectives and dollar goal
 - Describe the project's goals and benefits to community
4. Tell reasons why you are involved and recognize current board giving
5. Recognize prospect's past giving and resulting outcomes
6. Ask for gift
 - *We'd like to ask you for a gift of \$xxxx for this project. Can you do that? OR Would you do that for our community?*
 - Wait for prospective donor to respond!
7. Follow-up to reply as needed.
 - *Please complete this gift card so we can include your gift and properly recognize you.*
 - Respond to objections.
 - Schedule follow-up appointment if needed. Do NOT leave gift/pledge card.
8. Thank prospective donor(s)

AFTER THE VISIT

- Send a hand-written thank you note
- Send any follow-up materials or answer questions raised during visit
- Report results to Board/Staff
- Record gift/pledge or follow-up as promised
- If gift is secured: Update fundraising/campaign report; announce gift internally and publicly as appropriate and only with donor's permission