

**Asking for the Gift:  
How to Ask for the Gift and  
How to Teach Your Volunteers to Ask for the Gift**

Volunteers are our most effective and productive fundraisers. Engaging them in soliciting contributions is your single most efficient way to raise contributions for the organization.

Volunteers are golden. They participate because of their commitment to their community and to the work your organization does. People respect them for being dedicated to the cause.

Learn how to ask for the gift. Learn how to teach your volunteers to ask for the gift. Unleash the greatest asset the organization has – dedicated volunteers.

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## Quote

*To some extent all philanthropic acts involve advocacy because each reflects the donor's attitudes and values, and constitutes a vote for or against some issue...*

*Acting either as individuals or in association with others, American philanthropists have promoted temperance, peace, and woman suffrage, opposed slavery, assisted fugitive slaves, and protected children and animals against abuse.*

Robert H. Bremner, Ph.D.  
Professor Emeritus, History  
The Ohio State University

## What Are the Sources of Gifts in the United States?

### 2009 contributions

\$303.75 billion in the United States

Giving in the United States is 2.1% of Gross Domestic Product

<b>% of Total</b>	<b>Amount</b>	<b>Source of Contributions</b>
4%	\$14.10 billion	Corporations
8%	\$23.80 billion	Bequests
13%	\$38.44 billion	Foundations
75%	\$227.41 billion	Individuals

<b>\$ of Total</b>	<b>Amount</b>	<b>Recipient Organization</b>
33%	\$100.95 billion	Religion
13%,	\$40.01 billion	Education
10%	\$31.00 billion	Private foundations
10%	\$28.59 billion	Unallocated giving
9%	\$27.08 billion	Human services
8%	\$22.77 billion	Public-society benefit
7%	\$22.46 billion	Health
4%	\$12.34 billion	Arts, cultural, and humanities
3%	\$8.89 billion	International affairs
2%	\$6.15 billion	Environment/animals
1%	\$3.51 billion	Foundation grants to individuals

***Giving USA 2010***

***The Annual Report on Philanthropy for the Year 2009***

Giving USA Foundation

## Why Should You – and How Do You - Involve Volunteers?

Volunteers are the heart of social change. The people they approach will listen and respect them because they are investing their own time and resources to change society.

*A great volunteer, George, once told me and a group of young volunteers why he loved to ask people to give. He said when he asks for a gift the organization wins because it can serve more people. The people we are serving win because we can provide better services. Most importantly the people I ask for a gift win because they have an opportunity to participate in their community.*

There are many ways for your volunteers to participate. Many of your organizations have opportunities for volunteers to be activists or to give of their talents. Now give them the opportunity to promote the organization so more people learn about your work. And, give them the opportunity to seek contributions.

There are three simple points for your volunteers to keep in mind as they make contacts for the organization.

### Communications

Communicate our plans and keep our promises to our contributors. Be clear in our requests. Report back to our contributors with information about the difference their gift or volunteer service made.

### Human relations

Build relationships with people. People like to participate with organizations - as volunteers and contributors - where they feel involved and where they relate well with others involved. You reaching out to people you know is vital to the health of our organization.

### Good manners

Do what it takes to make the other person, including people representing organizations, comfortable. Use this as a guide to decide whether or not to write or call first or the kind of follow-up needed after meetings or telephone calls. The more comfortable you make the person, the more apt the individual will take the time to hear about our organization and consider participating as a volunteer and/or contributor.

## Is Your Message Ready for Prime Time?

### Mission and Vision Statements

*A mission statement is like an introductory paragraph: it lets the reader know where the writer is going, and it shows that the writer knows where he or she is going. Likewise, a mission statement must communicate the essence of an organization to the reader – and an organization's ability to articulate this indicates its focus and purpose. A mission statement typically describes an organization in these terms:*

- Purpose. Why the organization exists and what it seeks to accomplish.*
- Business. The main method or activity through which the organization works to fulfill this purpose.*
- Values. The principles or beliefs which guide an organization's members as they pursue the organization's purpose.*

*Whereas the mission statement summarizes the what, how, and why of an organization's work, a vision statement presents an image in words of what success will look like.*

This is quoted from the book: *Strategic Planning for Nonprofit Organizations. Articulating Mission and Vision*

### Case for Support

The case statement is the foundation for all other marketing and fundraising materials. The case statement addresses current operating needs, new program ideas, physical plant needs in equipment and buildings, and endowment needs. It describes how gifts will be used. Often, it also sets a theme for a given period of time.

Make your case for support by presenting this information:

1. Mission and purpose of your organization;
2. Problem your organization is addressing;
3. Uses and needs of gifts: program priorities for three to five years, physical plant needs in equipment and buildings, and endowment.
4. Reasons your organization is the organization to meet these identified needs, its heritage, and how it is unique;
5. Successes;
6. Program budget and supporting financial statements documenting uses of gifts;
7. Time period during which it will raise these gifts.

From this case statement all other fundraising materials will be written, developed, and prepared. Tailor your case to cultivate and solicit segments of your market.

## **What Materials Will You Need?**

From the case statement all other fundraising materials are written, developed, and prepared:

- Solicitation materials for soliciting lead gifts
- Direct mail letter and Email solicitations
- Solicitation materials for sponsorships of events
- Website as it pertains to resource development
- Proposals to businesses/corporations
- Proposals to foundations
- Proposals for government grants and contracts
- e-newsletter
- Fact sheet
- Stories about contributors
- List of contributors

Also, consider developing a tagline if your organization currently does not have one. Here is a checklist for developing taglines.

1. Must convey your nonprofit's or program's impact or value.
2. Must be authentic.
3. Must be broadly and easily accessible and memorable, avoiding jargon and acronyms.
4. Must be specific to your organization, not easily used by another nonprofit reaching out to the same audiences.
5. Must be eight words or less.
6. Must be highly visible and integrated into all print, online, multimedia and most verbal communications.
7. Must make an emotional connection.
8. Must capture the spirit or promises of your organization.
9. Must clearly complement and/or clarify your organization's name without duplicating it.
10. Must take the tone that will connect with your audiences while being true to your organizational "self." Humorous, earnest, tangible, or abstract.

## **How Do You Broach the Subject with a Prospective Contributor?**

Why have you given to our organization?

What is your connection to our work?

What sources do you use to gather information about a charity before you contribute?

How do you typically decide which organizations to contribute to and the amount?

What do you expect from the organizations you give to?

Do we provide you the information you desire? In a timely manner?

Do you have suggestions on how we could improve the information we provide you?  
Content or format?

Are our materials about how to make a gift clear and easy to follow?

Would you encourage others to give to us? Why or Why not?

As we ask others to give – what do you consider our greatest strengths?

Any weaknesses we should correct?

Do you have suggestions on how we could improve our contacts with you and other contributors?

Are there people you know - who give - you would be willing to introduce us to?

Who is the best contributor you know? Why do you consider this person a good contributor?

Do you know people with an interest in (describe your program)?

Would you solicit others for a gift for our organization?

Would you serve on our Board of Trustees?

Are there people who influence your giving?

Are there people whose giving you influence?

What is the greatest joy you have had from a gift you made? Why?

What is the biggest mistake charities make when they ask you or others for a gift?

## **What Are 101 Ways for Volunteers to Promote Your Organization and to Seek Gifts for It?**

In our era of social media, we talk about weak to strong connections. Volunteers are vital to engaging people. Volunteers – through your personal contacts – are integral to making weak connections strong. Our organization needs volunteers to engage activists and contributors.

1. **Make your gift!**
2. Place a link to the organization's website on your signature on all your personal emails.
3. Place a link to the organization's website on your Facebook page.
4. Place a link to the organization's website on your personal website.
5. Place a link to the organization's website on your professional or business website.
6. Develop contacts at your local radio stations. Invite them to contact the organization as the recognized expert on (topic)?
7. Develop contacts with local newspapers. Invite them to contact the organization as the recognized expert on (topic).
8. Develop contacts with magazines. Invite them to contact the organization as the recognized expert on (topic).
9. Develop contacts with local cable networks. Invite them to contact the organization as the recognized expert on (topic).
10. Develop contacts with your local legislators. Educate them about the organization.
11. Make contacts when the organization calls you to action.
12. Forward calls to action to your Facebook fans
13. **Volunteer to telephone recent contributors to thank them for their gift.**
14. Forward calls to action to everyone on your email list.
15. Tweet about the organization.
16. Invite every member of your family to events.
17. Invite your friends to events.
18. Invite your business associates to events.
19. Forward the organization's Guidestar listing to everyone on your email list.
20. Post a notice about the organization's Guidestar listing on your Facebook page.
21. Forward the organization's annual report to everyone on your email list.
22. Post a notice about the organization's annual report on your Facebook page.
23. Tell every member of your family that you are active with the organization and why.
24. Tell all your friends you are active with the organization and why.
25. Tell your business associates you are active with the organization and why.
26. **Volunteer to telephone and solicit prospective contributors on our list.**
27. Personally ask every member of your family to give to the organization.
28. Personally ask your friends to give to the organization.
29. Personally ask your business associates to give to the organization.

30. Write a letter to every member of your family asking them to give to the organization.
31. Write a letter to your friends asking them to give to the organization.
32. Write a letter to your business associates asking them to give to the organization.
33. Volunteer to bring five friends to the office to telephone and solicit prospective contributors on our list.
34. Send an email to every member of your family asking them to give to the organization.
35. Send an email to your friends asking them to give to the organization.
36. Send an email to your business associates asking them to give to the organization.
37. Ask your local Rotary Club, Knights of Columbus, or VFW if you may speak at a meeting about the organization.
38. Ask your human resource office whether or not your company will match your gift to the organization.
39. Make a monthly gift. This is easily accomplished by instructing us to charge your credit card a specific amount every month.
40. Ask the person who solicits you for United Way how you can designate your gift to the organization. They MUST let you designate the organization, even though it is not a participating United Way agency.
41. Ask all your co-workers to join you in designating their United Way gift to the organization.
42. Does your company participate in any other giving program like United Way? Find out how the organization can become a qualified organization for this giving program.
43. Does your company adopt charitable organizations for the holidays? Will they designate the gift to the organization?
44. Does your company adopt charitable organizations for casual Friday's? Will it designate the gift to the organization?
45. Host a house party. Gather people you know to learn more about the organization.
46. Participate in a local race – 5K – 10K – or marathon. Ask your friends and family members to sponsor you by making a gift to the organization.
47. Run in a major marathon – New York, Boston, Philadelphia – and register for the organization.
48. Throw a party for your birthday, anniversary, or retirement. Ask your friends and family to give to the organization as their present to you.
49. Contact the people who normally give you a gift for your birthday. Ask them to honor you with a gift to the organization for your birthday as your gift.
50. Contact the people who normally give you a gift for Christmas, Chanukah, or other religious holiday. Ask them to honor you with a gift to the organization.
51. Do you know local businesses that designate a percentage of its sales for a charitable organization? Ask the business to designate the organization as the recipient.
52. Transfer stock to the organization. By transferring the stock and having the organization sell it, you typically do not pay capital gains tax and may be eligible for a charitable contribution deduction.
53. Do you know families affected by our issues? Introduce them to the organization.

54. Contact local union leaders. Ask if they will accept information for the newsletter about topics of interest to – and benefit of – their members. Work with the organization to place information.
55. If you blog, write a post about why you are dedicated to the organization.
56. Challenge your golf buddies. Set one day at your regular golf course to run a challenge.
  - Specify a par 3 hole as the challenge hole.
  - Before the challenge either purchase hole-in-one insurance for the prize or solicit a gift that your buddies will be willing to compete for.
  - Charge each golfer an entrance fee of \$10, \$25, or more dollars to play for a hole-in-one.
  - The golfer who makes a hole-in-one wins the prize.
  - If no one makes a hole-in-one, raffle the prize.
57. Challenge your ski buddies.
  - Develop the challenge.
  - Determine a charge for each skier.
  - Solicit a gift for the prize.
58. Challenge your sailing buddies.
  - Develop the challenge.
  - Determine a charge for each skier.
  - Solicit a gift for the prize.
59. Do you know professional athletes? Introduce them to the organization.
60. Do you know TV or film celebrities? Introduce them to the organization.
61. Do you know business owners? Introduce them to the organization.
62. Are you a member of a union? Ask for a gift to the organization.
63. Can you place links to the organization's website on the websites of other organizations? Confirm with the organization that it is an organization it wishes to associate with.
64. Can you place links to the organization's Facebook page other Facebook pages?
65. **Include the organization as a beneficiary of your retirement plan or IRA.**
66. Make a banner supporting the organization. Take it to the next game you attend – Bruins, Celtics, Patriots, Red Sox. Work to get it on the local TV coverage.
67. When you are asked to advertise in programs for events, include a listing for the organization.
68. Do you sit on the board of charitable, nonprofit organizations? Tell your fellow board members about the organization.
69. Introduce these individuals on the board of these charitable, nonprofit organizations to the organization.
70. Do you sit on the board of for profit businesses or corporations? Ask for a gift for the organization.
71. Introduce the organization to local businesses and corporations.
72. Ask local business and corporations for a gift for the organization.
73. Wear the hat with the organization's name and logo proudly and often.
74. Use the mug with the organization's name and logo at your place of employment.
75. Wear the pin with the organization's logo often. Tell all you meet about the organization.

76. Are there foundations, especially family foundations, with headquarters where you live or work?
  - Do you know any Board or staff members?
  - Introduce them to the organization.
77. Find the community foundation in your area.
  - Check for people you know on the Board, on the staff, or among the donor advised funds.
  - Ask these Board and staff members about the potential for the organization applying for a grant.
78. Include the organization as a beneficiary of your life insurance.
79. Ask these foundation contacts if they might recommend other foundations for the organization to contact.
80. Do you know attorneys who manage trusts or foundations? Speak with them about these trusts and foundations and whether or not the organization is eligible to apply.
81. Are there locations near you that would accept the organization's brochures? Arrange with these locations how the brochures will be displayed and arrange to keep them in stock.
  - Banks
  - Community centers
  - Libraries
82. Give the royalties from the book you write to the organization.
83. Give items for auction when the organization holds an event.
84. Solicit items for auction when the organization holds an event.
85. Host friends at the organization's annual event.
86. Host family members at the organization's annual event.
87. Host business associates at the organization's annual event.
88. Give a percentage of your lottery winnings to the organization.
89. Buy the organization's mug and give as holiday gifts to your family members.
90. Make a gift to the organization in honor of a friend for their birthday.
91. Make a gift to the organization in honor of family member for their birthday.
92. Make a gift to the organization in memory of a friend.
93. Make a gift to the organization in memory of a family member.
94. Save your change. Keep the change in a piggy bank until you have \$50 to give to the organization.
95. Place a link to the organization's event registration page on your personal website.
96. Send the link to the organization's event registration page to everyone on your email list.
97. Send an invite to the organization's event to your Facebook friends.
98. Place photographs from the organization's event on your Facebook wall.
99. Let everyone you go to religious services with you are active with the organization and why.
100. Ask for the opportunity to address the mission committee about the organization.
101. Tell the world why you are dedicated to the organization. State why it is the organization that has the greatest potential for making sweeping social change.

## **Appendix A**

### **Development Committee**

The Development Committee is responsible for Name of Organization’s fundraising program. It is a committee of the Board and is comprised of Trustees and other volunteers. It is staffed by the Executive Director and the Development Director.

#### **Description of Duties and Responsibilities**

Name of Committee	Name of Organization Development Committee
Number of Committee Members	9, Trustees and other volunteers
Purpose	Identify, cultivate, and solicit prospective lead givers for current operating gifts and planned gifts for endowment.
Duties and Responsibilities	<ul style="list-style-type: none"> <li>Make a lead gift.</li> <li>Solicit lead gift from employer.</li> <li>Cultivate and solicit Trustees.</li> <li>Evaluate Name of Organization’s materials used to cultivate and solicit lead givers.</li> <li>Evaluate Name of Organization’s annual fundraising goals.</li> <li>Identify, cultivate, and solicit lead gift prospects.</li> </ul>
Skills Required	<ul style="list-style-type: none"> <li>High visibility.</li> <li>Record of leading philanthropic giving.</li> <li>Access to current and prospective lead contributors.</li> </ul>
Time Required	One day per month.
Benefits to Organization	Significantly increase contributions for operations and endowment.

**Appendix B**  
**Sample Copy**  
**Response Cards, Websites, Newsletters, and Acknowledgments**

**To inform contributors the organization is qualified to receive contributions:**

The organization, a 501(c)(3) nonprofit organization, is qualified under Section 170 of the Internal Revenue Service Code to receive gifts, grants, and contributions which are deductible for federal income tax purposes.

**To comply with Internal Revenue Service regulations to inform contributors that no goods or services were provided:**

This is to confirm that no goods or services were received from the organization (Federal ID number) in exchange for your contribution, in accordance with current Internal Revenue Service regulations.

**To inform contributors that you are not providing legal or accounting advice:**

The information provided in the organization's materials is not intended as legal, tax, or investment advice. Please consult your attorney, tax professional, or investment professional for such advice.

## Appendix C

### Suggested Resources

Center on Philanthropy  
<http://www.philanthropy.iupui.edu/>

Internal Revenue Service  
<http://www.irs.gov/charities/index.html?navmenu=menu1>

Massnonprofit  
Inform. Share. Thrive.  
[www.Massnonprofit.org](http://www.Massnonprofit.org)

Barbato, Joseph, and Danielle S. Furlich. *Writing for a Good Cause: The Complete Guide to Crafting Proposals and Other Persuasive Pieces for Nonprofits*. New York: Simon & Schuster, 2000

Bremner, Ph.D., Robert H. *American Philanthropy*. 2nd ed. Chicago, Illinois: The University of Chicago Press, 1988

Fremont-Smith, Marion R. *Governing Nonprofit Organizations, Federal and State Law and Regulation*. Cambridge, Massachusetts: The Belknap Press of Harvard University, 2004

Rosso, Henry A. and Associates *Achieving Excellence in Fund Raising*. San Francisco, California: Jossey-Bass Publishers, 1991

Seymour, Harold J. *Designs for Fund-Raising: Principles, Patterns, Techniques*. 2nd ed. Rockville, Maryland: Fund Raising Institute, The Taft Group, 1988

Shaw, Sondra C., and Martha A. Taylor. *Reinventing Fundraising*. San Francisco, California: Jossey-Bass Publishers, 1995

*Giving USA 2010: The Annual Report on Philanthropy for the Year 2009, 54<sup>th</sup> Annual Issue*, The Center on Philanthropy at Indiana University, Indiana University – Purdue University – Indianapolis, Giving USA Foundation, 2010.