
for money in person, you should always get a yes, because the first person you ask should be yourself. Once you test the proposition that the group is worth supporting against your own bank account, you will have a much clearer sense of who else you know who might give and what amount they might consider.

After all the solicitors have made their own donations, and appropriate and adequate information has been gathered about the prospects, the solicitors should each have a list of people they are going to approach. They should plan to approach the people most likely to say yes first. These do not have to be your potentially biggest donors—what is important is to have two or three good experiences before you encounter anyone saying no. In our “Brussels sprouts before dessert” culture, solicitors sometimes start with the hardest people “to get them over with.” Don’t do that. You need the experience of hearing someone respond positively early on to carry you through some of the harder requests.

HOW TO APPROACH THE PROSPECT

The solicitors are now ready to approach their prospects. The most formal approach involves three steps:

1. An e-mail or letter describing the organization or the specific need, including a sentence or two indicating that you wish to ask the prospect for a gift and requesting a meeting to discuss it further, followed by
2. A phone call or e-mail to set up a meeting, and then
3. The meeting itself, in which the gift is actually solicited

Obviously, if you are approaching your spouse or your best friend you can skip the letter and perhaps even the phone call. In other cases, particularly for smaller gifts, the letter may be enough and there will be no need for a phone call. In others, the letter and a phone call will be enough, and there will be no need for a meeting. Deciding whether a meeting or follow-up phone call is necessary will depend on your knowledge of the prospect and how much money you are requesting. Some people are very comfortable giving \$250, \$500, or even \$1,000 in response to a phone call from someone they know. If the prospect lives far away from the organization or the solicitor, she or he may be more willing to have an extended phone conversation than to expect the solicitor to visit them.

Regardless of how generous, easygoing, or committed your prospects are, they will be more likely to give if you follow up your letter with a phone call, and they will almost always give more in a meeting than when asked over the phone. Remember, you are requesting a thoughtful gift—a gift that is big enough that a person needs to think about whether they can afford it and whether they wish to give your organization a gift that big. You want sufficient time with prospects to answer all their questions and concerns. It takes about thirty minutes to have the conversation you need to have, and a thirty-minute meeting seems a lot shorter than a thirty-minute phone call.

THE E-MAIL OR LETTER

The letter should raise the prospect's interest, giving some information but not enough for a truly informed decision. If a letter, it should not be longer than one page. An e-mail may even be shorter. Its purpose is to get the prospect to be open to the phone call in which the solicitor requests a meeting. In other words, the letter introduces the fact that you will be asking for a large gift for your organization and that you want the prospect to be willing to give a short amount of time to hear why you want this gift and why you think this prospect will be interested. No commitment to give or to be involved in any way is asked for in this opening correspondence—only a request for the prospect to discuss the proposition of a gift with the solicitor. A sample letter is shown here:

Ms. Concerned Activist with Good-Paying Job
Professional Office Building
City, State, ZIP

Dear Connie,

For several years you have heard me talk about the Downtown Free Clinic. As you know, I have recently been elected to serve on the board, which I am really excited about! At a recent meeting, we decided to launch a major gifts campaign, the main purpose of which is to help the clinic become financially self-sufficient. In the future, we want to depend on a broad base of donors rather than on foundations and government grants, which have proven most unreliable.

The goal of the campaign is \$50,000 the first year. All of us on the board have made our own commitments, which total \$15,000. We are now turning to other caring people in the community to raise the rest. We need some lead gifts in the range of \$1,000 to \$2,000 from people of standing in the community whose word and example carry weight. I am hoping you will consider being one of the leaders in the campaign because of your long-time activism in community health care.

(Include one more brief paragraph on the current programs of the organization.)

I know this is a big request, and I don't expect you to decide on the basis of my letter alone, so I am hoping we can meet and talk. I am very excited about the direction the Downtown Free Clinic is taking, and I can't really do it justice in this letter.

I'll call you next week to set up a time. Hope you are well. Enjoyed seeing you and your family at the baseball game last week.

Best always,
Annie
Another Concerned Activist

The letter is straightforward. Connie knows what the request will be, including the amount. She knows what the money is for. If giving anything to this organization is out of the question for her, she can decide that now. If giving a lead gift is out of the question, it is implicit from the letter that a smaller gift is an option. Her importance to the campaign has been stated, which is flattering, but there is nothing she needs to do at this point except wait for the phone call. No action has been requested—in fact, she has specifically only been asked not to decide.

An e-mail would have most of the same content, with various choices of subject line, such as “Free Clinic hat on,” “A request,” “Starting an exciting campaign.”

The last paragraph of the e-mail would probably say, “Let me know what would be a good time to get together next week.” There are a number of advantages to e-mail; one of the biggest is that the meeting can often be set up without a phone call. A return e-mail or texting about a time and place to meet may be the next step.