



## Step 5 – ENGAGEMENT

It is the engagement part of the process that takes the most amount of time. In fact the amount of time it takes is unlimited. It is also one of the most important stages as this is the point when you start getting to know your potential donors personally and ultimately successful fundraising is all about building good relationships.

Donors, especially those that are likely to give, can receive many requests to engage from charities. Therefore it is important to focus your message using personalised communication, where appropriate, in a way that addresses their motivations.

There are lots of reasons why you would want to engage. Some of them include:

- To find out more about your donor
- To build rapport
- To make them feel valued and important
- To inspire them about the cause
- To reaffirm their motivations
- To confirm their capacity to give
- To establish trust
- To decide when to ask

There are lots of ways to engage. Some of them include:

- Thank you Events
- Information Events
- Project Visits
- Dinners
- Personal Visits to their home, place of work
- Personal Notes
- Phone Calls

The more personal the engagement is the better the impact it has. Think about the atmosphere you are trying to create and the needs and motivations of the donor.

It is always useful to see how other organizations engage their current and prospective donors as it is far easier to take a good idea and make it better than to come up with an idea from scratch.

Be clear who is responsible for the engagement with the prospective donor(s) and who is going to be involved in the engagement. You want to make sure that the most appropriate people are involved. It is also very important to keep records and review them.

### KEY POINT

For those donors who are already giving you need to make sure that you are able to hold on to them (and try to inspire them to give more) by keeping them happy and feeling that they are appreciated and cared for (This is sometimes referred to as 'Retention' in the fundraising world).

Once you have developed contact with a few well connected people you could consider forming a steering group who would then be in charge of pulling in more well connected/rich individuals. This is a perfect way of keeping your existing supporters engaged.

It is also important to keep a record of your engagements with your donors/potential donors.

## Step 6 – 'ASK'

We have talked earlier in this guide about money not being the only thing that you might be looking for from a potential major donor. However if it is money you are seeking then there are various things to consider. These have been laid out below. Many of the principals can also be applied to asking for other things such as fundraising on your organisation's behalf or championing your organisation.

Asking for money can be very scary. The best way to get over the anguish of asking is to be prepared and practice as much as you can.

Prepare the 'Ask':

- Know the story you are going to tell or the picture you are going to paint<sup>1</sup> when you 'Ask' for the money
- Put the donor at the centre of what you are going to say, think about the part of the story they will find most appealing and emphasise that
- Decide on something tangible that you can ask for and think carefully how you present it to them (*see key point below*)
- Revise the most frequently asked questions with colleagues
- Think how you can involve board member, volunteers or beneficiaries in the 'Ask'
- Make sure you have a menu of things in decreasing order that they can give so that if they say no to the first thing you ask for you have a back up
- Think about the win-win situation to ensure both parties benefit in some way
- When the potential donor asks questions try to keep one question back so that if they say no at the final 'Ask' you have a good reason to get back to them
- Think about having another current donor there to discuss their experience and inspiration for giving

### KEY POINT:

When you are thinking about what to ask for it needs to be something tangible and defined. It often helps if it is something that wouldn't be funded any other way i.e. without their support it wouldn't happen. For example it could be a building, some equipment, an extra staff member that will mean you can answer all the helpline calls rather than letting them go on to answer machine etc.

### How to make the Ask

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<sup>1</sup> By creating a picture in a persons mind through a description or a story it can help a person relate better to what you are talking about

There are various different ways that you can make the 'Ask'. Some people like to have a script prepared in advance although it is better not to stick to it rigidly. The more relaxed and natural you are the more likely the potential donor will feel relaxed to give. For an example of a solicitation script please **see Solicitation Script (Appendix 5)**.

### **Who to make the 'Ask'**

It may also not be you that has to make the final 'Ask'. It is important to choose the right person carefully.

It could be:

- Existing Major Donors
- Beneficiaries
- CEO
- Trustees
- Senior volunteers/supporters

It is sometimes thought that someone who has the same social/economic status as the potential donor is the most appropriate person to 'Ask',. This is sometimes referred to as peer to peer fundraising. However this does not always apply and the best person to make the 'Ask' needs to be decided on a case by case basis. There are no hard and fast rules.

It is also widely accepted that it is much easier when the person that makes the 'Ask' has given themselves. This is a good reason to encourage your own trustees to donate something. Even if it is minimal it puts them in a stronger position when making the 'Ask'.

Sometimes more than one person will go to the final meeting. In this case you should think carefully about who should speak about what.

### **Preparing for the obstacles**

The process is very rarely smooth so be prepared to find yourself facing obstacles.

#### **Possible obstacles and responses**

- **Prospect puts a time limit on the meeting** – confirm how long you think you will need with them and if they don't feel they can spare that time at this meeting suggest another time
- **Prospect offers a gift that is too small** – Possible response: "Do you think you could give us this amount each year?" You might want to accept this gift and take it as the first. You could also say: "I'd feel wrong about taking this gift now. Can we wait until I've told you more?"
- **Prospect is a non talker or silent** – ask open questions, try to ask for more information
- **Prospect is aggressive or talkative** – listen to them, be gentle how you talk with them
- **Prospect says 'I have to talk to my partner'** – S/he could be stalling for time – You could say: "Is there more information I can give you?" You could also ask to meet the partner: "When could we get together with your partner and anyone else in the family that would be interested?"
- **Prospect says 'That's a lot of money'** – This could be a lot of money for them. "It sounds like you're wondering why we need this much for this project." Try to find out

where the difficulty is. Reaffirm why you'd need that much. Ask them what part of the project they would like to be part of.

- **Prospect says 'We're overcommitted'** – Empathise: "It sounds like you really would like to support us but are committed right now. When might you be able to give in the future?"
- **Prospect says 'We don't believe in giving to operating costs'**- Possible response: "Would you like to see the impact your gift would have?"

### **Top tips for making the ask**

- Be yourself and let your personality show
- Conversation should be two way
- Listen
- Be clear what you are asking for
- Use the magic words: would you consider..?
- Paint pictures
- Focus on benefits to beneficiaries
- Ask and then stay quiet
- Don't blurt out your own opinion
- Avoid aggression or judgement
- Practice Practice Practice makes PERFECT