

A nighttime photograph of the Seattle skyline, featuring the iconic Space Needle on the left and various skyscrapers illuminated against a dark blue sky.

NWAIS
The Art Of The Ask
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Million Dollar Annual Fund Script





Opening Call

You: Hi, this is (identify yourself) from the development office at the Academy, first let me say that everything is fine with your (son or daughter). (They will respond) The purpose of my call today is to speak with you about the annual fund. Have I reached you at a good time to have this conversation?

Asking permission is the best way to demonstrate respect for your prospect. Adapting to their perspective while accomplishing your objectives is the first elements of stewardship they will experience

New Parent

You: You and spouse name, are new to Academy this year and we want to make sure that we work with you in the appropriate way regarding your philanthropy. Is our conversation about the annual fund something that you and I can speak about now or should we try to schedule a time when I can get the three of us on the line to discuss potential support?

Starting to discuss giving with new families on their terms will pay long-term dividends.



Closing For Time

You: I am sorry that I reached you at an inconvenient time. Would later this week or sometime next week be best?

Prospect: Next week would probably be better.

You: Would the first part of the week or later in the week be best?

Prospect: Later in the week

You: So either Thursday or Friday?

Prospect: Thursday's great day

You: Morning or afternoon better for you?

Prospect: Morning is really good

You: 9 or 10 o'clock?

Prospect: 10 would be perfect

You: Wonderful I look forward to speaking with you next Thursday at 10 AM. Have a wonderful day

Calling at a time that is suggested by your prospect gives you a slight advantage with the annual fund conversation. It is also an opportunity for you to shoot them a reminder email the day before your appointment.

You at follow up call: "Hi John, (identify yourself) when we spoke last you mentioned this was a good time for you to discuss the annual fund and asked that I call today. Is this still a convenient time for you and I to have that conversation?



Closing For Time

You: I'm calling today to see if you and (spouse's name) would be one of our key leadership financial partners this year at the \$5000 level, is this something that you could consider?

Prospect: Yes we can do that

You: First, let me say thank you so much for your commitment and support, is greatly appreciated by the Board of Trustees and the entire community. We would like to make sure that we communicate with you effectively about this gift, would you share with me when you might see yourself fulfilling this commitment.

Prospect: We typically like to give after tax time.

You: That's great. So around the end of April?

Prospect: Yes

You: Many of our supporters appreciate a reminder about a month ahead of time, is this something that would be helpful for you?

Prospect: That would be very helpful

You: Wonderful I will make a note to send a reminder to you at the beginning of April. Again, thank you so very much for your support. Have a wonderful day.



They Say Yes To Dollar Amount!

You: I'm calling today to see if you and (spouse's name) would be one of our key leadership financial partners this year at the \$5000 level, is this something that you could consider?

Prospect: Yes we can do that

You: First, let me say thank you so much for your commitment and support, is greatly appreciated by the Board of Trustees and the entire community. We would like to make sure that we communicate with you effectively about this gift, would you share with me when you might see yourself fulfilling this commitment.

Prospect: We typically like to give after tax time.

You: That's great. So around the end of April?

Prospect: Yes

You: Many of our supporters appreciate a reminder about a month ahead of time, is this something that would be helpful for you?

Prospect: That would be very helpful You: Wonderful I will make a note to send a reminder to you at the beginning of April. Again, thank you so very much for your support. Have a wonderful day.



Can't Give At Level

You: "I'm calling today to see if you and (spouse's name) would be one of our key leadership financial partners at the \$5000 level, is that something that you could consider?"

Prospect: "That is a bit beyond us."

You: "Some of our supporters don't realize that they are able to spread payments out over the school year. Could you see yourself partnering with us at this level if you had between now and the end of next June to fulfill the commitment?"

Prospect: "That still probably won't work for us."

You: "Is this something you could consider if you split it up between this school year and next school year?"

Prospect: "Yes we could do that." (get clarity on payment schedule, and thank!)

Or

Prospect: "No we just can't commit to that level."

You: "I certainly understand and very much appreciate your consideration. Where might you see yourself in supporting the school this year?"



Not Happy-There Is An Issue

You: "I'm calling today to see if you and spouse's name would be one of our key leadership financial partners at the \$5000 level, is that something that you could consider?"

Prospect: "I have to tell you that our daughter's recent experience with the volleyball team has got us rather upset and disappointed with the school."

You: "I appreciate you making me aware of this. Would I have your permission to share that information with the appropriate people?"

Prospect: "Yes you do"

You: "Thank you, I will do that. The reason I wanted to have a few moments of your time today was to discuss the annual fund and your potential participation at the leadership level. Is that something that you could consider?"

Add a little bit of body text



I Pay Tuition Don't I?

You: I'm calling today to see if you and (spouse's name) would be one of our key leadership financial partners at the \$5000 level, is that something that you could consider?

Prospect: Don't I pay you tuition?

You: Yes, as you probably are aware, Academy like the majority of private colleges, universities and independent schools rely on a philanthropic partnership with our community in order to deliver the best experience for students as possible. Would you be open to a conversation about joining other families in supporting the school in this manner?

You will need to act on prospects response. Some folks just won't play and that is good to know.



Talk It Over With Spouse

You: I'm calling today to see if you and (spouse's name) would be one of our key leadership financial partners at the \$5000 level, is that something that you could consider?

Prospect: I think this is something we could consider but I like to talk it over with my spouse

You: Thank you so much for considering supporting us at the leadership level. Would a week be enough time for you and (spouse's name) to have that conversation?

Prospect: Yes I think that will work

You: Would you be open to me calling you back a week from today?

Prospect: Yes that would be fine.

You: Would morning or afternoon be best for you?

Prospect: Afternoon would be best

You: 1 or 2 o'clock?

Prospect: 2 would be best

You: Wonderful I will make a note to give you a call at that time. I just want to thank you and (spouses name) for taking the time to consider supporting the school at a leadership level. Have a wonderful day



Renew Gift

You: I'm calling for two reasons today, the first is to thank you for your leadership support last year, you are part of a very special group that actually generates approximately 80% of our annual philanthropic support. And the second is to ask if you would continue being one of our key supporters at the \$5000 dollar level again this year?

Prospect: yes we sure can (thank away)

If No

You: We are grateful that you have been able to support us in the past at such a leadership level. At what level might you see yourself this year partnering with us?

Increase Gift

You: I'm calling for couple of reasons today, the first I do want to thank you very much for your support last year our entire community is grateful to those that go beyond tuition and partner with us philanthropic probably. We are grateful for your continued support over the past several years. The second reason I am calling, is to ask if you would consider elevating your partnership with us this year with a leadership gift of \$10,000?

Capital Campaign Solicitation





Setting The Major Gift Stage

The Actors

The major gift or capital campaign solicitation requires significant amount of time prior to this meeting taking place. Sometimes years. This script assumes that all the work has been done to earn the right to be at the table for this conversation with these key prospects. Think of this script as a framework for you to design this critical conversation in a personalized way for your prospect. The major gift solicitation is a mini one act play. Success requires being disciplined about your role. Understanding your contribution to the solicitation is critical in creating the professional experience you want your prospect to have and achieving the outcome you desire.

There are three characters in this play.

1. The Romancer

This is the person, or potentially one of two people, delivering the passion and also identifying the desired outcomes that this campaign will create. This person has a key question that must be answered before the asker begins to play a role. Ideal candidates for this role are head of

school, key board member, chair of the campaign or a highly regarded member of the community.

2. The Asker

This individual needs to be incredibly comfortable with the solicitation process. They need to put the agreed-upon dollar amount on the table for the prospect to consider. They need to adapt to any objection and they need to create clarity around gift fulfillment in order to avoid any misunderstanding between the donor and the institution. Ideal candidates for this role is the director of development, a major gift officer, a board member that is highly skilled and trained with a track record of closing and creating clarity with 6, 7, or 8 figure gifts.

3. The Donor

People playing these roles do not have to memorize any lines or be disciplined. They get to completely improvise. It is worth noting that skilled romances and askers manage the breath of any improvisation that may take place.



Capital Campaign Solicitation

The Stages

The point knowing “the stages”, is to make sure that you effectively manage the environment so that your campaign conversation can be as effective as possible.

Restaurant

One of the most popular spots to have capital campaign conversations is over dinner. Restaurants are terrific meeting spots however they do come with a few challenges. Once seated it is important to quickly get everyone at the table and your wait staff on the same page. This ensures both uninterrupted meeting time and your guest's comfort.

After a couple of inconsequential moments of banter subtly call the table to order.

"Betty and John thank you so much for making the time to be with us tonight, as you know we do have the business component of our time together this evening. If it's okay with you I'll ask our waiter to come over, take our drink orders, and then I will ask him to leave us alone so we can have our 10-minute meeting conversation. After that, we can relax enjoy a terrific meal, and we can all catch up. Would that be ok?"

The prospects almost always say yes

The staff request. Get your waiters first name if possible, in this scenario let's assume his name is Robert.

"Robert, I have a favor to ask of you. We have a conversation that we need to have before we order dinner. However, we don't want to do that without first ordering some drinks. Would you mind taking our drink order, bring them to the table and then wait for me to signal you when we would like to order dinner. Could that work?"

I have used this strategy hundreds of times. It has always been a successful way to manage the environment and keep the prospects comfortable. Nothing could have been more distracting than in the middle of the Romance passionate explanation about the schools initiative to have our waiter arrive to ask us how we are all doing and to give us the evening's specials. Managing the environment is a level of professionalism that will be noticed by your prospects.

Office

Prospects office is often a great spot to have a major gift conversation. People are used to making decisions at work. It is important to remember why you are meeting. I would encourage you to stay away from small talk or making comments about items in your prospect's office. Opening conversational doorways when you don't know what's on the other side has the ability to bring a thought or feeling into the room that is not helpful to the conversation you wish to create.

Example being;

You comment: “John that is an incredibly unique painting”

John's response: “thank you, it is extremely special to me, it takes me back to the time when I lost my first dog, and best friend, Max

Now you need to segue into your conversation that is about the potential of your school's initiative. Do not open doorways when you don't know what is on your side.

Home

What you want to avoid when meeting in someone's home is being distracted by getting a tour, before the solicitation, of something that is a source of pride for your prospect.

Example

Prospect: “I'm thrilled you are here today, and I would love to take you on a tour and show you our award winning Rose Garden”

You: "that would be delightful, as you know we do have a business part of our time together today. Would you be open to us sitting and having that conversation before the tour?

The purpose is to complete the point of you being in their home. Having the business component hanging over everybody's head during your tour doesn't do anyone any good.



Getting The Campaign Appointment

"Hi, this is Jay calling from the Academy have I reached you at a good moment? The head of school and I would love to find the time in the near future where we could have dinner with you and your spouse in order to discuss a potential investment in our initiative."

If they say yes then you are now closing for time

If they say no, or something like: "don't worry about taking us just send us something in the mail and we will make a commitment."

It's important to remember that the goal is to have these strategic conversations face-to-face. You want your prospect to feel they are really helping you by getting together. Your response would be something like:

"We completely understand and respect the value of your time. As we move forward with this initiative it is so important that we have these key conversations face-to-face with our good friends. These meetings also help us continue to improve our ability to work with our constituents as effectively as possible. We would be so grateful if you would give us the opportunity to have a conversation with you in a more personal way. We would be happy to limit our conversation to 20 minutes if that would be best for you, or if dinner would still be of interest we would love to do that. Could either of those work for you?"

Hopefully, after that, you are closing for time.



The Campaign Solicitation

Romancer

"Betty and John, thank you so much for making the time to be with us today. I would like to first thank you for all the support you've shown our organization over the years. It is really because of people like you, that we can aspire to new levels of excellence."

"I'd like to walk you through our initiative and hear some of your thoughts on the potential outcomes for a school. Would that be alright?"

It is here where the Romancer needs to inject their passion and belief in this project. The Romancer will outline the goals and objectives and discuss some of the specifics based on an understanding of the prospect's interests.

This part of the conversation could take 3 to 10 minutes. Often during this phase, the prospect may ask questions, the Romancer will engage those and if he/she needs any support, from others at the meeting, they will ask for it. At no time should any member of the solicitation team interrupt any actor during their segment without permission.

What is important to remember is that you are still within the romance portion of the conversation. Nothing moves forward or onto the actual solicitation until the Romancer asks the handoff question.

Handoff Question

"Betty and John, when you think about this initiative (or insert the appropriate campaign elements) and the outcomes we've discussed, which of those, do you feel will have the greatest positive impact for our school?"

It is at this moment in the conversation when your prospect may improvise. If they have not answered "The Handoff Question" it will be important for the Romancer to answer any question they ask and then circle back and reframe the handoff question to the prospects.

Once the prospects answer the handoff question it is time for the Asker to take the stage.

Asker

A response could sound like:

John says: "I think the endowment is a critical piece in helping the school stay financially strong in the future."

Betty may not respond.

The Asker needs to include her.

"Betty what are your thoughts?"

Betty may confirm that she feels as John does or she may include something else. Whatever the response it is essential to create a space where each prospect has the opportunity to share their point of view.

The Asker

"Betty and John, other people in our community, feel precisely as you do about this initiative, and that is specifically why we are here today. We would like to invite you to consider being one of our key financial partners with a million-dollar investment in this initiative. Is that something you could consider?"

"Yes, we would be happy to do that" replies John

"Thank you so very much for your commitment to making the initiative possible and for your belief in the school."

This is the only point where another member of the solicitation team could interject, without permission, and express gratitude.

The next step is for the Asker is to create clarity.

"Betty and John, we want to make sure that we communicate with you effectively regarding this commitment. With that in mind, how might you see yourself fulfilling this pledge?"

he prospect will define how they will complete the commitment. The Asker must capture every detail in order to communicate appropriately with the donor and provide the finance committee a degree of clarity on future revenue. It is also a start to the gathering of information to create a stewardship plan.

"Jane and I, see ourselves fulfilling this pledge over two years and will make the first gift in two months and then the second a year later."

"John, thank you for defining that for us, if you don't mind I would like to make sure that I heard you correctly, would you mind if I repeated that back to you? Will these be equal installments? He responds yes. You will be making the first of \$500,000 gift in two months and that the second installment of \$500,000 will be a year later, correct? John replies yes. Many of our supporters appreciate a heads up about a month from their scheduled gift. Would it be helpful if we sent a reminder to you for the second installment?" However, John responds, operate on his instructions.

You need to be ready to map out gifts that may be paid over 3 to 5 years. Creating clarity around these transactions is the initial work to effectively steward these important donors.

Now let's assume John pushes back on the amount. The asker's job is to ask again for the same amount but in a different way.

John "That may be a little high for us"

"We can appreciate that John, if you had complete flexibility in how you designed the fulfillment of such a gift could you see yourself partnering with us at this level?"

This is either a yes or no response. The yes circles you back to creating clarity around the payment structure of the gift.

If John's response is still no, then there is only one response. Ask them where they may see themselves so they can tell you what they have already discussed and decided on.

"John and Betty, at what level might you see yourself partnering with us?

Once you have that response, you hopefully will be creating clarity around gift payments.

If the response requires time then close for time.

John may say "I'd like to speak with my financial advisor before making our commitment".

"John and Betty thank you so much for considering such an important gift to the school. Would a week or two be enough time for you to have that conversation?"

John "week should be good"

"Wonderful, would earlier or later in the week be best for you?"

John "later would be good"

"Either Thursday or Friday?"

John "Thursday"

"Morning or afternoon?"

John "morning is always best"

"9 or 10 o'clock?"

John "nine"

"Great, I will make a note to give you a call at 9 o'clock next Thursday. Betty and John, thank you so very much for your time today, we are grateful for everything you do and have done our institution."

At this point, you can move on to small talk, enjoy your meal or depart with clarity about next steps.