



Rachel
MUIR

HOW TO BE A CHAMPION FUNDRAISER

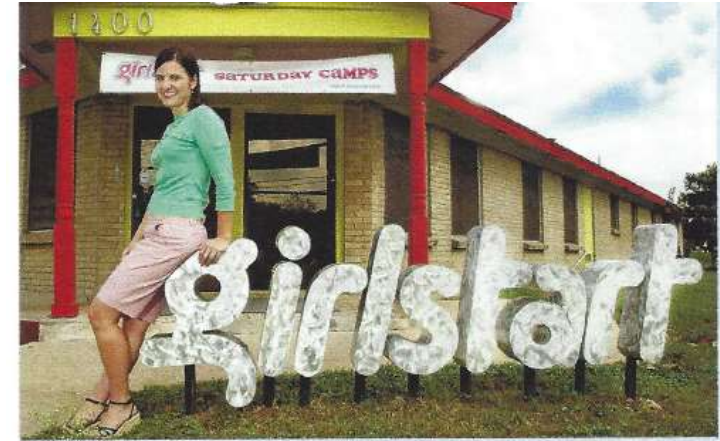
April 17 2024 | TEFN



Rachel Muir, CFRE

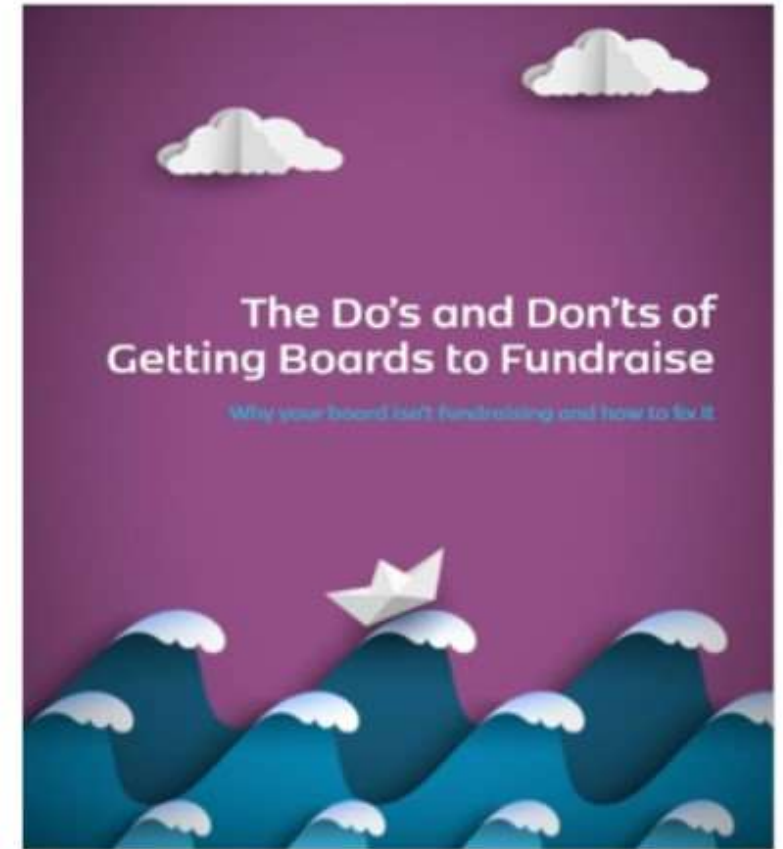
- Founder: Girlstart
- Featured on: Oprah, CNN, the Today Show
- AFP Outstanding Fundraiser of the Year
- What Rachel does: custom training, board retreats, online classes
- Weaknesses: wine tastings, chips, queso

www.rachelmuir.com





How to be a Champion Fundraiser



**Scan QR code on left to
get your free board templates**

GIRLS LEAD SAMPLE

2020 BOARD MEMBER PLAN

Thank you for stepping up as a board member to prepare girls for a lifetime of leadership! Your contributions as board member will build girls of courage, confidence and character who make the world a better place.

We don't take our mission (or your commitment) lightly. There's a lot to be done. We ask you to bring a positive fundraising attitude, your skills, time, and effort. While you're on our board we ask to be one of your top three charitable commitments. What can you expect from us? Training and support to be effective, a variety of engagement options to choose from and choice in how and when you give.

To accomplish this, we've crafted an "all you can eat" menu of philanthropic opportunities to give board members lots of variety in how you support our mission. Please select what interests you and we'll follow up accordingly. We encourage you to mark all the areas that interest you.

STEWARDSHIP

- Introduce myself as a Girls Lead Board Member at networking and community events.
- Write donor thank you cards (we'll give you sample scripts + materials)
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Director or Development Director.

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Rate your board



Green – we are rocking and rolling


Yellow – meh, we could use some fine tuning

Red – please send help!!!

Slides: www.rachelmuir.com/handouts

What's your board's experience level?



- 
1. At least a few board members are new to serving on a board.
 2. 100% of our board members have prior board experience.

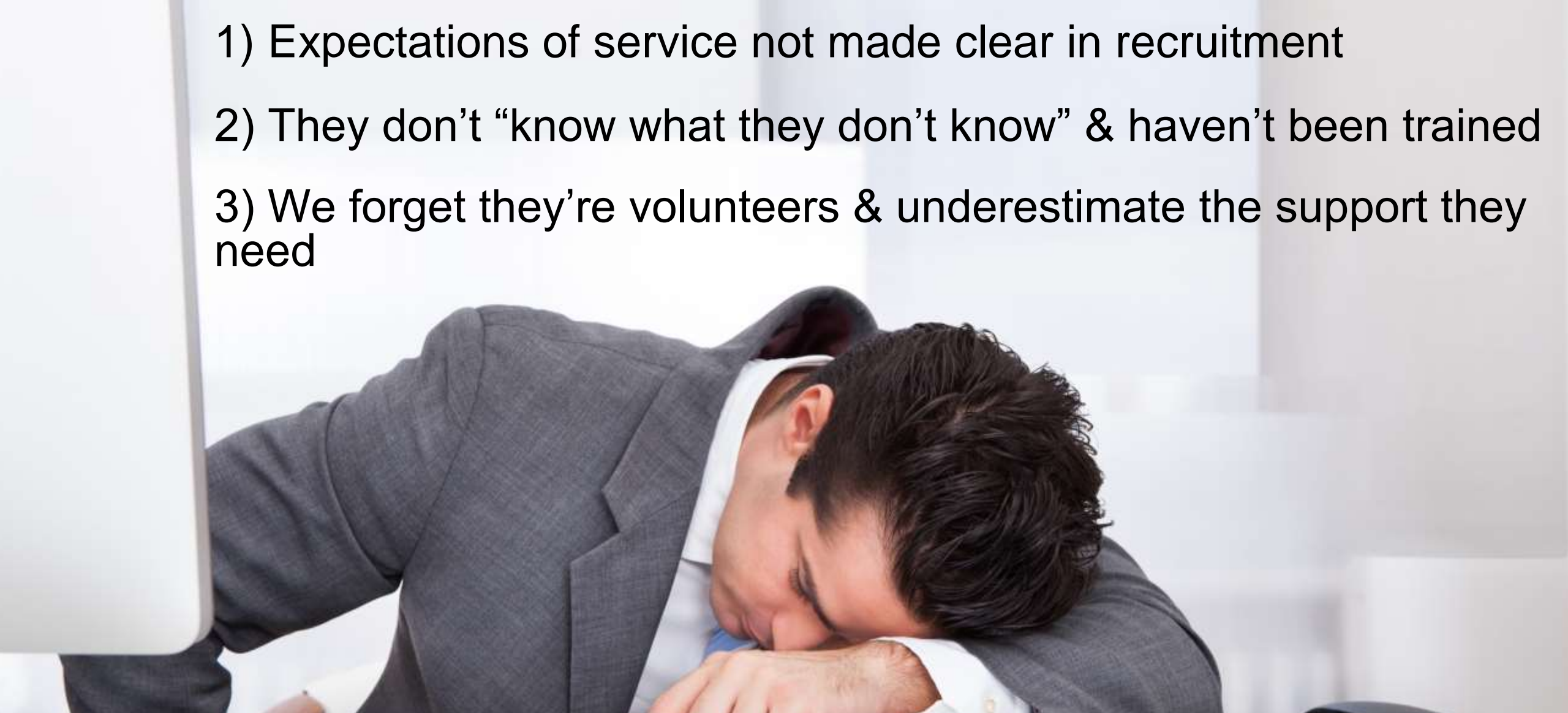
How often do you offer board training?

1. Yes! At least once a year.
2. Every other year.
3. Once every few years.
4. Aack! We know we should...



Three reasons why it's not working

- 1) Expectations of service not made clear in recruitment
- 2) They don't "know what they don't know" & haven't been trained
- 3) We forget they're volunteers & underestimate the support they need




Missed connections....

- ✓ They have busy lives
- ✓ Don't have context/background that we do
- ✓ May lack connection to mission
- ✓ No "one size fits all"
- ✓ They don't understand nonprofits (may be their first experience with one)





There is no such thing as an allergy to fundraising



Oprah is not a
fundraising strategy



Unclear expectations are a path

to failure

Consider your invitation to fundraising





Is it...

Made clear in the board recruitment process?

Specified in the board contract?

Discussed in the board orientation?

Give and Take

Board members provide...

- Positive fundraising attitude
- Skills, time, effort
- Give generously – 1 of top 3 charitable commitments while on the board

What you can expect in return...

- Training & support to be effective
- Engagement options (fundraising menu)
- Choice in how and when you give (online, monthly installments, events, etc)

Sample board member recruitment questions

1. Why are you interested in giving your time & talent to us?
2. What do you think are the characteristics of a great board member?
3. Fundraising is a part of board service. Can you tell us about your experiences with fundraising?
4. What skills, connections, resources and expertise are you willing to offer or use on the behalf of the organization?
5. What motivates you?
6. Are you willing to make us one of your top 3 philanthropic commitments with a stretch gift during your service?



Have you...
ever been
given a fundraising
goal you had no
role
in setting?

Introducing board members to fundraising

Step 1

- How does fundraising work in our organization?
- Show model, mix of sources, goals
- Line item for board giving in your budget

Step 2

- Their role
- Where they can add value
- How staff can support them





Make fundraising relatable

What's the #1 thing you want your board members to know about fundraising?





Board member motivation is different.



Treat board members like donors.



Getting board members excited about fundraising
is easier than you think

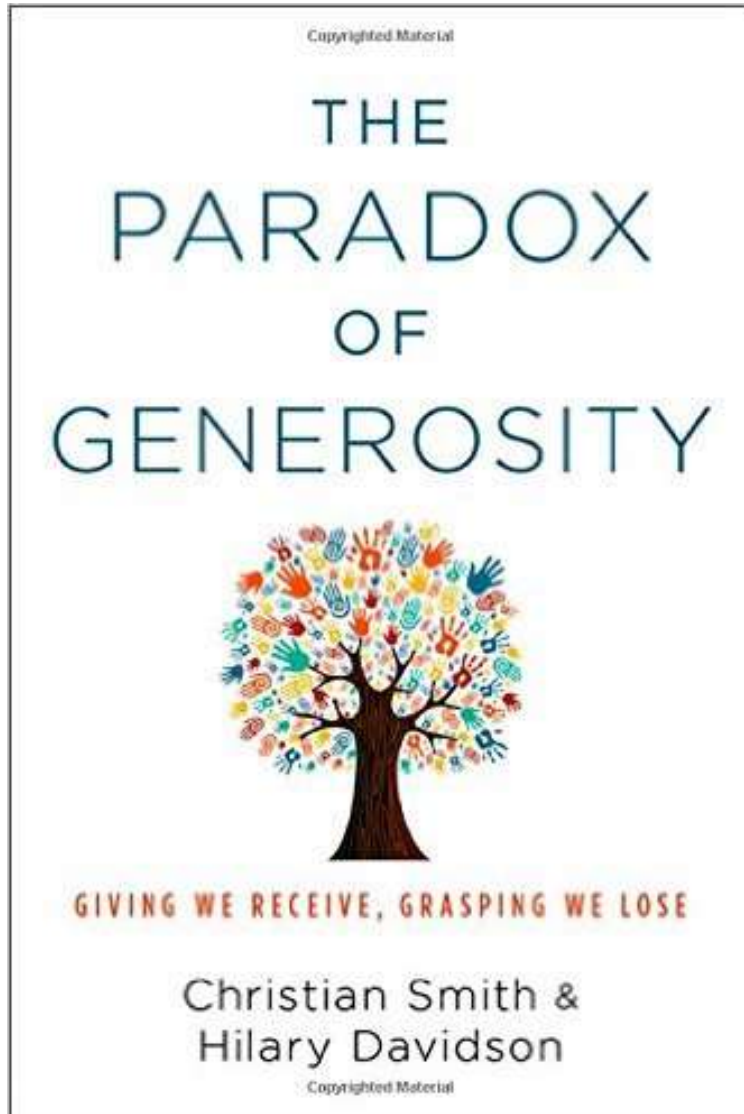


GIVING = WINNING THE LOTTERY

Donors are 43% more likely to say they are “very happy” than non-donors



Most comprehensive study of American donors



Studied 2,000 people over 5 years

More generous you are, the happier & healthier

Lower rates of depression

Lower blood pressure

Increased feelings of self worth



Focus on the rewards of how good giving feels



That warm and
glowing feeling
that comes over
you when
you give to a
cause you love.



How good it feels to invest
in something that helps so
many...





How it feels to
be honored
and celebrated
for their
generosity...

How proud you are
of your friends who
work so hard for
the causes they
love...



“I don’t want to ask my friends.”

Truth

- They likely share your values
- They want to help
- Our work as volunteers is a source of pride for them

Source: Andy Robinson,
What every board member needs to know, do and avoid



What kind of giving feels best?



“Donors feel happiest if they give to a charity via a friend, relative or social connection rather than an anonymous donation.”

Source: International Journal of Happiness and Development, 2013

“Sally, I’m on the board of of this terrific nonprofit, JDRF. One of my tasks is to raise money. I was hoping you could help with a donation of \$500. If you have other priorities, I certainly respect that. But I hope you can help.”



Source: Andy Robinson,
[What every board member needs to know, do and avoid](#)



Tips to make board members fundraising
superheroes

Name your organization in their will or estate

Invite 10 guests for tour of org

Get assigned to cultivate 2-3 donors

Fundraising Ideas for Board Members

Host cultivation event in their home

Share their giving story or client testimonials



Board Member Thank You Calls
(easy win!)

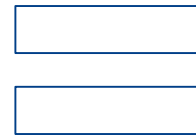
Board thank you call impact on gifts

**Thank you call
from board
member w/in 24
hours**



+39%

**14 months
later**



+42%

70% retention!

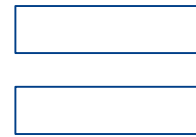
Impact on retention: board calls vs staff

**Thank you call
from board
member**



+25%

**Thank you call
from staff
member**



+10%

Simple Truth Why Boards Fail





These are my special goggles that allow me to see through all your bullshit...

A signpost with two signs. The top sign is white with a black border and the word 'GIVE' in bold black letters. The bottom sign is grey with a black border and the word 'TAKE' in bold black letters. The signpost is set against a blue sky with a few wispy clouds.

GIVE

TAKE

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www.
RachelMuir.com/
Boards

Set them up for success

- Board orientation
- Assign a board “buddy”
- 3, 6, 9 month check in
- Check in after 1st term to invite for 2nd or thank and release





Easy win: Board member thank you calls

Give them a thank you script

Hi Carol,

I'm John Smith, a board member from Parkinson's Association of the Carolinas.

We're so thankful to receive such a generous first-time gift from you and happy to welcome you to our donor family.

Your \$500 gift will give movement therapy classes to 30 people with Parkinson's. I'm so thankful to you, Carol. Your gift makes everyday life easier for patients with Parkinson's and their families that love them.

We will keep you update on how your gift is making a difference in our monthly emails but please call us here at _____ if we can answer any questions or help you in any way.

Prep them with discovery questions

Do you have any feedback for us?

Is there any way we can make your experience more positive?

How can we get you more involved?

May I invite you to _____?





...you've personally invited board members
to name your org in their will(s)

...you have named a charity in your will

Raise your hand if...you have a will

Ask your board at next board meeting

Do you have an estate plan? _____ Yes _____ No

Have you named a charity(ies) in it? _____ Yes _____ No

Do you have our org in your will? _____ Yes _____ No

If no, would you consider it? _____ Yes _____ No

Name (optional) _____

Ways to motivate board members

- Tapping into their motivational drives
- Giving them regular feedback
- Giving rewards and recognition
- Offering special privileges or incentives
- Providing training
- Giving public affirmations
- Having fun with them
- Thanking their families
- Positive gossip (brag to peers)
- Being available to them



Give a creative toy to celebrate great service like the Energizer Bunny

Create a "Member of the Moment" award for behind the scenes leaders

Give a funny award like a trophy to the board member who asks the best question

Before talking about fundraising, give board members a \$100,000 Candy Bar or a Payday.

Fun ways to motivate board members

Celebrate big events in member's personal, professional or volunteer lives.

After a long board meeting or retreat, hire a massage therapist to do chair massages

Include hobbies on your board roster. This gives members an opportunity to connect.

Make an "Above and Beyond The Call of Duty" award to give out anytime.

Tips to support fundraising training

- Solicit board feedback on topics in self-evaluation
- Recruit guest speakers
- Team up with other orgs to invest in training
- Recruit high performing board members from other boards as guest speakers



What about low performing board members who need to go?

Who initiates?

Governance committee

Board Chair



Graceful exits

Acknowledge failure to properly set expectations

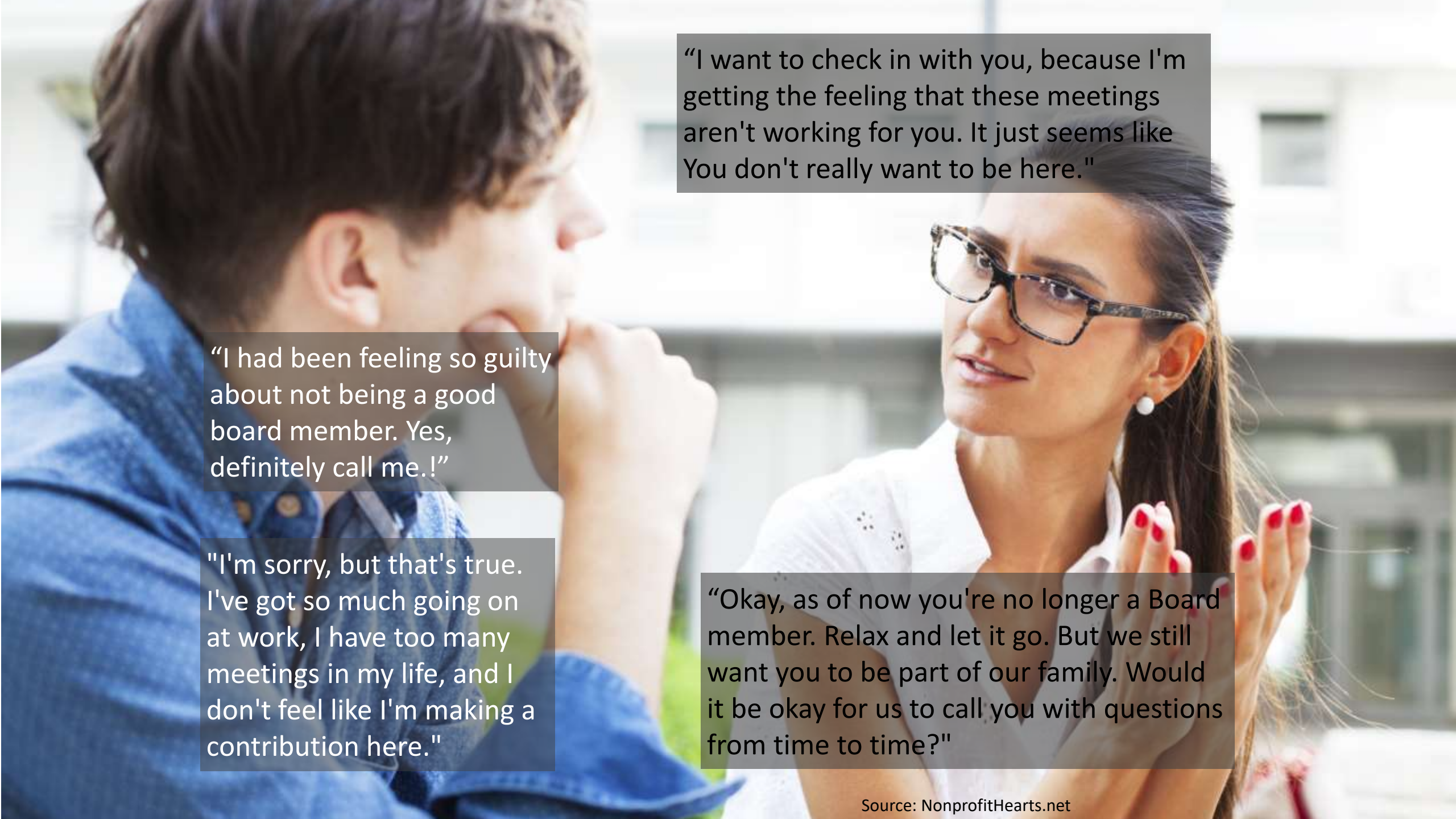
Be sensitive to any health, personal or professional issues

“Are you temporarily a lot busier than usual? Do you have the time?”

Offer a leave of absence

Explore less time-consuming options i.e Ad hoc committee, consult, mentoring



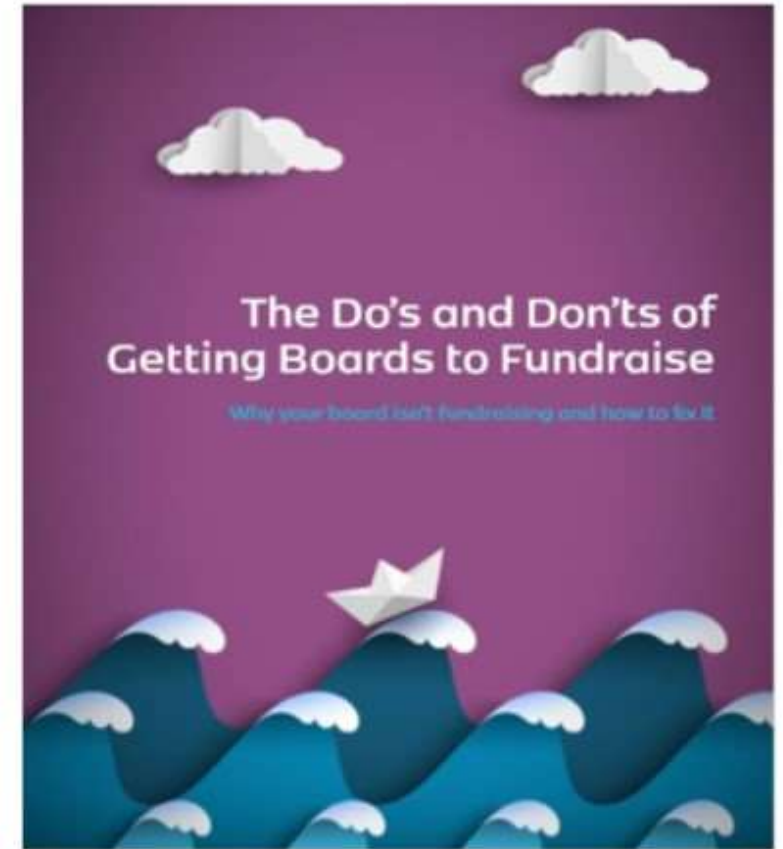
A man with dark, curly hair, wearing a blue button-down shirt, is shown in profile on the left. He has his hand to his chin, appearing thoughtful. On the right, a woman with long dark hair, wearing glasses and a white blouse, is looking towards him. Her hands are raised in a gesture of emphasis or explanation. The background is a blurred outdoor setting with a building.

"I want to check in with you, because I'm getting the feeling that these meetings aren't working for you. It just seems like You don't really want to be here."

"I had been feeling so guilty about not being a good board member. Yes, definitely call me.!"

"I'm sorry, but that's true. I've got so much going on at work, I have too many meetings in my life, and I don't feel like I'm making a contribution here."

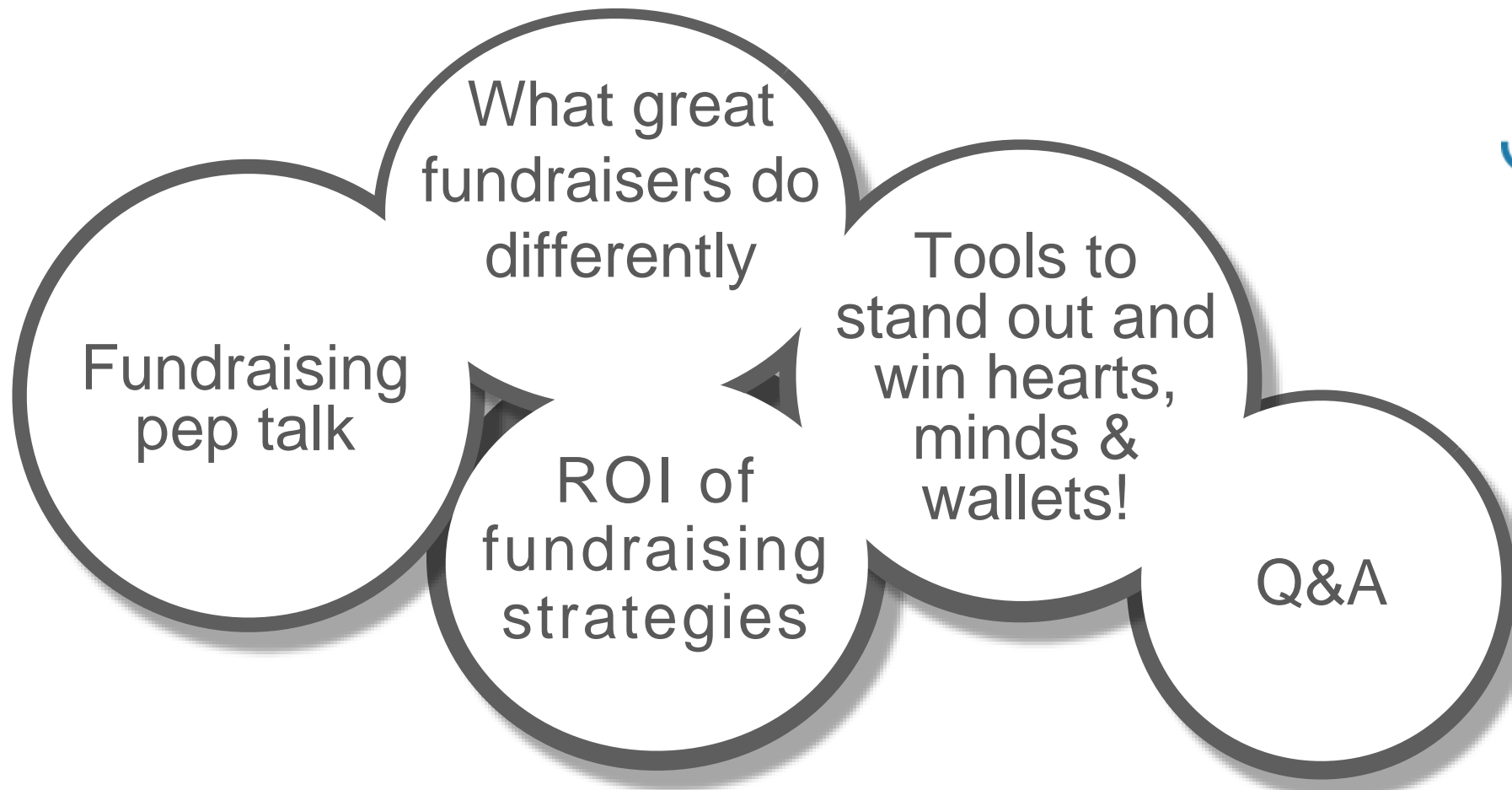
"Okay, as of now you're no longer a Board member. Relax and let it go. But we still want you to be part of our family. Would it be okay for us to call you with questions from time to time?"



**Scan QR code on left to
get your free board templates**

TIME FOR A
BREAK





Small Shop Guide to Fundraising

Fundraising Pep Talk



Rachel
MUIR



MONEY IS JUST PAPER



THEY PRINT MORE

EVERYDAY



“

You miss 100% of the shots
you don't take.”

Wayne Gretzky



“

Fundraising you don't do is *guaranteed zero revenue*.
It's also lost opportunity that you can never get back.

Jeff Brooks



[Facebook.com/RachelMuirFundraising](https://www.facebook.com/RachelMuirFundraising)

- ✓ Changing lives
- ✓ Helping people feel good
- ✓ Adding meaning to people's lives
- ✓ Helping people live longer, healthier lives

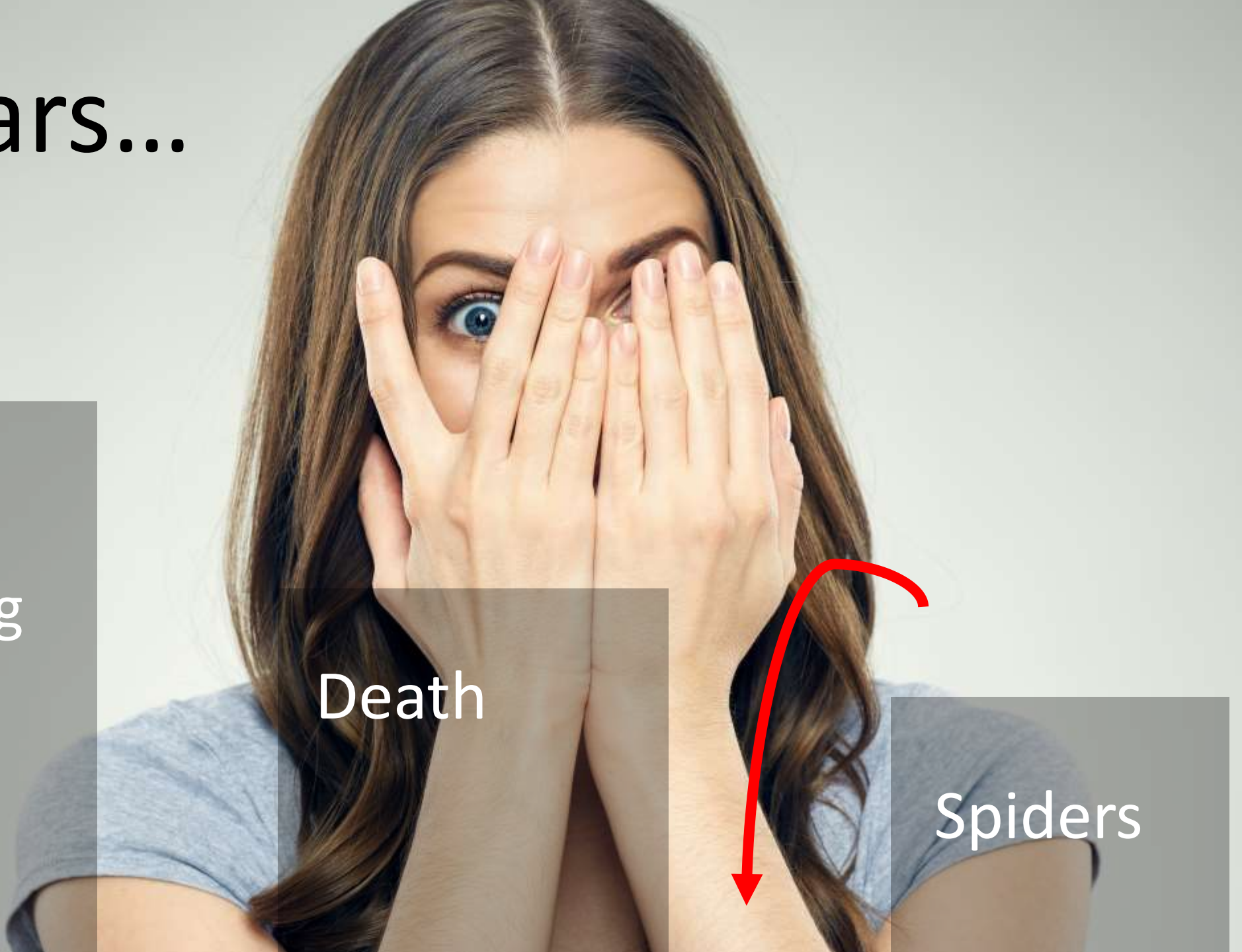


Top fears...

Public
Speaking

Death

Spiders



The world is full
of generous
people who
want to give

95% of the ask
is what leads up
to it

You're JUST
trying to make
the world a
better place

5 Fundraising Truths to Overcome Fears

Giving is
joyous and
feels great to
donors

Being asked
makes donors
feel important



“

Everything we know about how to build a good relationship as a parent or friend we can apply to fundraising.

Dr. Adrian Sargeant

rachel@rachelmuir.com



Facebook.com/RachelMuirFundraising



Care about what the
people you care about
care about.



The best way to have a meaningful relationship with a donor is to be meaningful to them.

What great fundraisers do differently



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THEY FOCUS ON THE GREATEST PROFIT:

MAJOR GIFTS

ROI of fundraising strategies

Strategy	Cost per \$1 raised
Direct Mail Acquisition	\$1.15
Special Events	50 cents
Planned Giving	25 cents
Direct Mail (to house file)	20 cents
Foundations/Corporations	20 cents
Major Gifts	5 to 10 cents
Monthly Donors	2 to 5 cents

Source: Erica Waasdorp, [Monthly Giving: The Sleeping Giant](#)



THEY HAVE A REVENUE GOAL & CULTIVATION PLAN
FOR MAJOR DONORS

If you don't know where you're going,
any road will take you there.

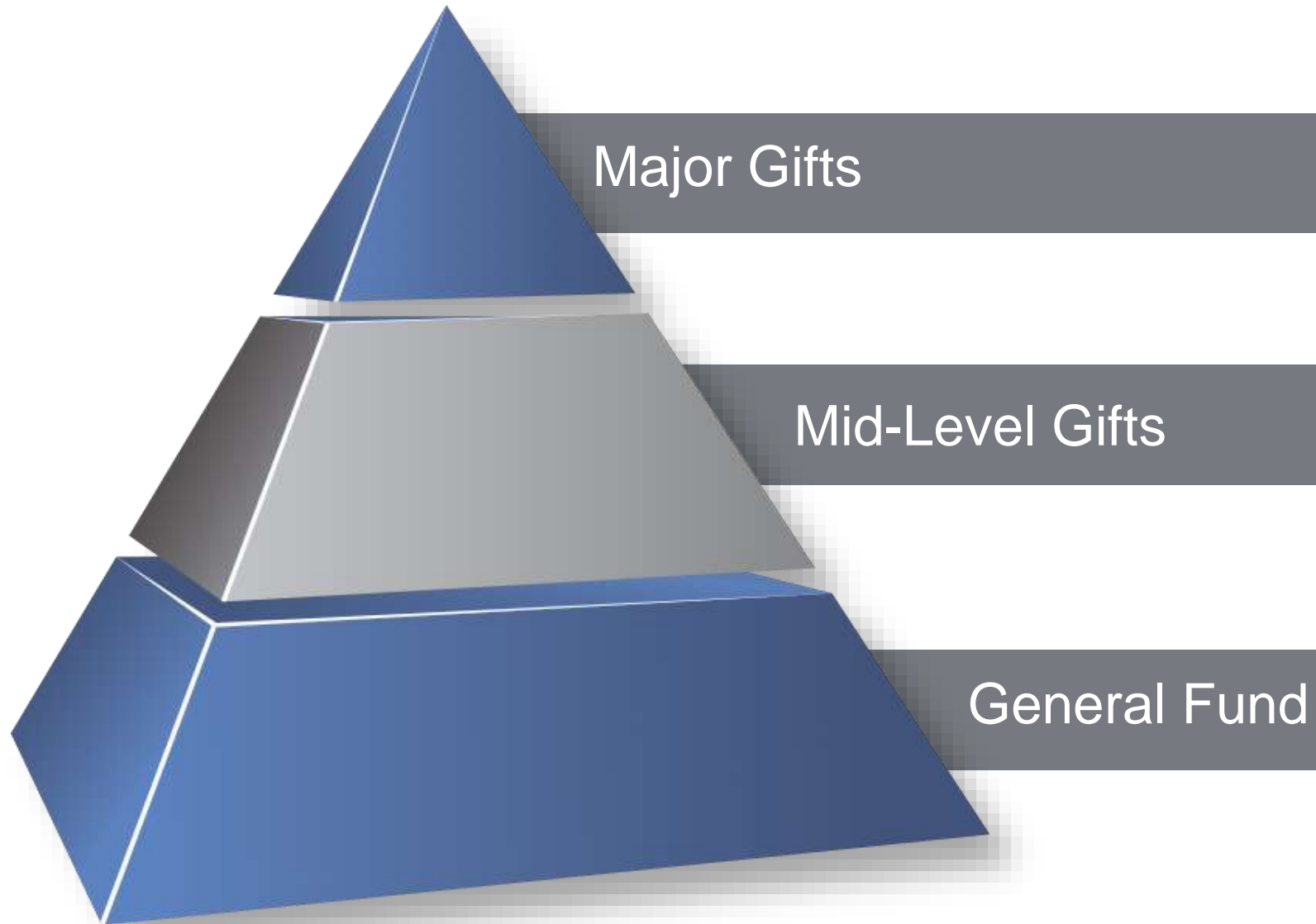
— George Harrison



Put donor revenue goal & cultivation plan to a calendar

First Name	Last Name	FY 2019	FY 20 Goal	Tier	Interests	Sep-20	Oct-20	Nov-20	Dec-20	Dec Goal	Dec Actual
Carol	Brady	\$10,000.00	\$15,000.00	A	Cats	Empty nest card	Invite to networking event	Thanksgiving call/card EOY appeal	Last chance EOY, holiday story	\$10,000	
Sam	Dollar	\$5,000.00	\$10,000.00	A	Pit bull rehab	Lunch	Photo of adopted pit bull	Thanksgiving call/card EOY appeal	Last chance EOY, holiday story	\$5,000	
Alice	Nelson	\$3,000.00	\$5,000.00	B	Cats	Email no kill article, retweet	Update photo of kitten nursery	Thanksgiving card EOY appeal	Last chance EOY, holiday story	\$3,000	

The Myth of the Donor Pyramid



What it really looks like



← Major Gifts

← General Fund



THEY KNOW THEIR DONOR

RETENTION RATES

There's math?

#1 most
important
fundraising
metric
to track





3rd YEAR DONOR RETENTION AVERAGE

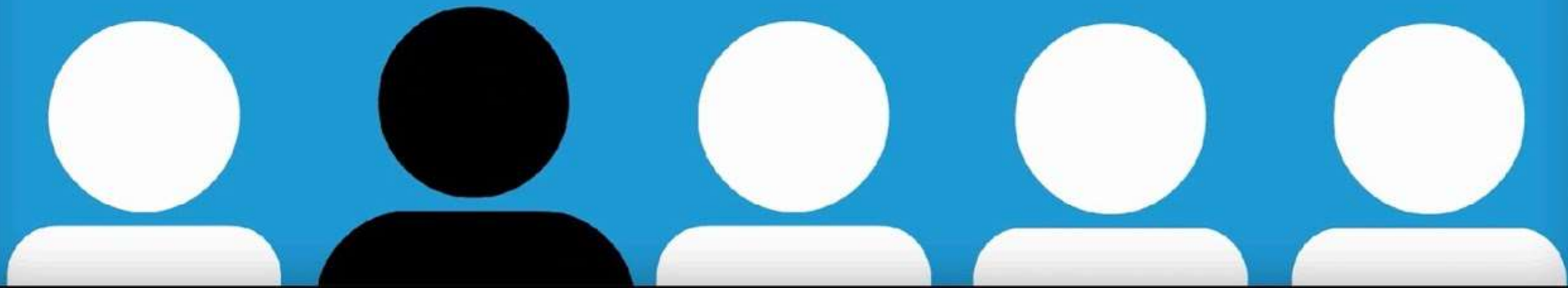
35% to 75%

Why retention is king



Source: Bloomerang

IS THIS YOU?





**DONOR
EXPERIENCE
RULES.**

**EVERYTHING
ELSE
DROOLS.**



THEY HAVE A

STEWARDSHIP PLAN

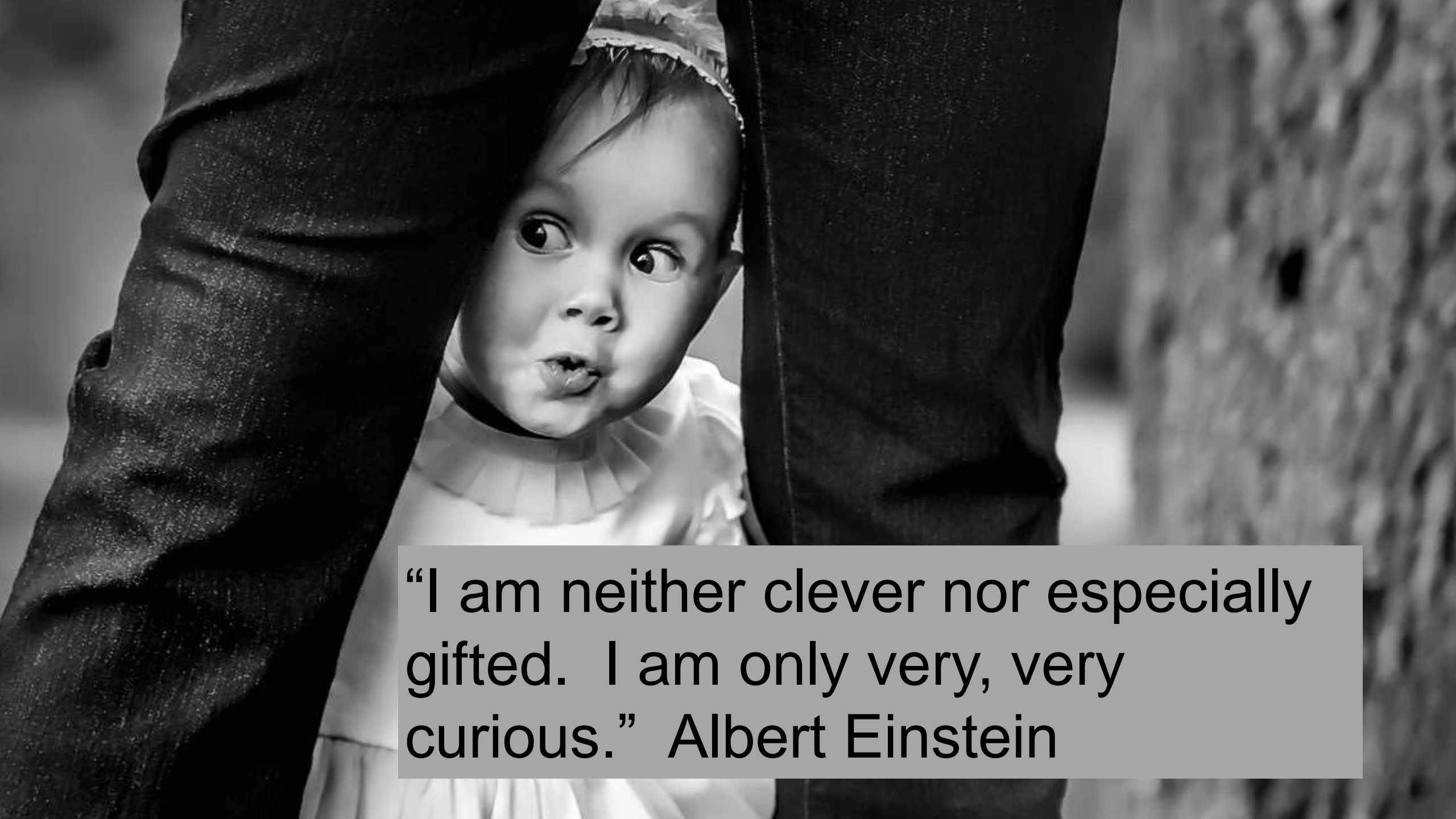
Stewardship Plan

CULTIVATION STEP	ACTION	OWNER	TIMELINE	NEW DONOR	2 ND GIFT	3+ GIFTS
Set up Google alert, Twitter and Google+ follow, add on LinkedIn	Set up	Development Director	Immediate	✓		
Thank-you call from Development Director	Call	Development Director	24 hours	✓	✓	✓
Handwritten thank-you with photo of pet and Development Director's business card	Provide card	Development Director	48 hours	✓	✓	✓
Personal thank-you call from CEO	Provide phone number	CEO	48 hours		✓	✓
Thank-you letter from ED with tax info on letterhead and business card	Print letter for ED to sign	Development Director	One week	✓	✓	✓
Letter: "You've only been supporting us one month and already your gift has..."	Create and send	Development Director	30 Days	✓		
Short online survey with five questions to get to know their interests	Create and send	Development Director	Three months	✓		
Short online/offline donor satisfaction survey	Create and send	Development Director	Every six months	✓	✓	✓
Personal thank-you call from Board Chair	Give gift amount, background, script	Board Chair	Annual		✓	✓
Thank-you note from Board Chair	Send Board Chair info, card	Board Chair	Annual		✓	✓
Internal memo from ED with insider view	Write and send	CEO	Quarterly	✓	✓	✓
Invite to donor focus group	Plan and organize	Development Director	Annual		✓	✓
Card and call on anniversary of first gift "You've been supporting us X year(s) and you've..."	Write card	Development Director	Annual	✓	✓	✓
Thanksgiving thank-you call	Pull list and call	Development Director	Annual	✓	✓	✓
Invitation to tour shelter, mobile spay/neuter clinic, etc.	Send invite	Development Director	Annual	✓	✓	✓
Personal note on annual report	Write	CEO	Annual		✓	✓

Stewardship plan:

Business rules for how donors will be thanked, acknowledged & cultivated.

Download at:
rachelmuir.com/stewardship



“I am neither clever nor especially gifted. I am only very, very curious.” Albert Einstein

Rachel Muir's Charm School Tips to Connect with Donors

Rachel
MUIR



“First date” discovery questions

- What motivated you to make your first gift to us?
- What is the most satisfying philanthropic gift you ever made and why?
- Of all the great agencies you’re involved with, who does the best job of keeping you involved?
How?
- What legacy do you most want your giving to have in the world?
- What do you love about what you do?

www.rachelmuir.com/discovery

Every visit is a discovery visit!

Personal Interests/Lifestyle

Tell me about your life.

Reasons for Giving

Why did you first give to our organization?

What do you hope to achieve with your philanthropy?

How do you like to be invited to make a gift?

What philanthropic gift has given you the greatest joy? How?

As you think about making a difference, what appeals most?

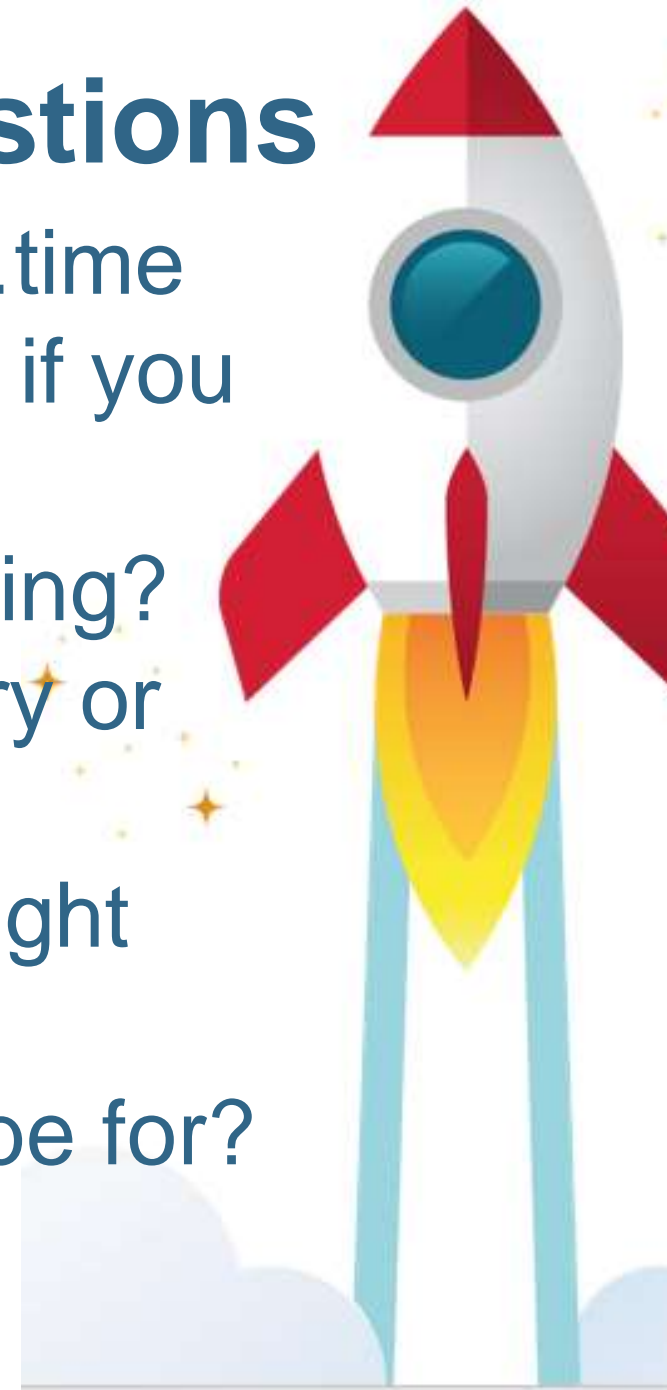
Knowledge of Organization

What interests you most about organization? Why? As you think about (this issue, the org, this program, the future) what are some of your worries? What are your hopes?

Rapport building discovery questions

- Which do you wish you had more of...time or money? What would you do with it if you got it?
- What makes you happy despite anything?
- What is something new you'd like to try or learn?
- What mistake or failure in your life taught you the most?
- If you could be famous what would it be for?

www.rachelmuir.com/discovery



Scan QR code or download
rachelmuir.com/discovery



The Lucrative
Art of Great
Discovery

A step by step guide to quickly build
rapport & make the most of every
moment with your donor

Rachel
MUIR

bloomerang

The image shows a laptop screen displaying a book cover. The cover features a cartoon illustration of a young boy and girl holding hands, with a large bunch of pink heart-shaped balloons above them. The background is a light green and white gradient. The title 'The Lucrative Art of Great Discovery' is written in a pink, sans-serif font. Below the title is a subtitle in a smaller, green font. At the bottom left is the author's name 'Rachel MUIR' in a blue and yellow font, and at the bottom right is the 'bloomerang' logo in a green and black font.



“

The goal isn't to impress people
but to let them impress you.

Marty Neumeier,
The Brand Flip:
Why Customers Now Run Companies

“

Donors don't give because you're excellent.
They give because *they* are excellent and
you help them realize their awesome selves.

Jeff Brooks,
[How to Turn Your Words into Money](#)

“When you see...

A homeless person sitting on a park bench, or sleeping under a bridge, you wonder what you should do. That’s the kind of person you are.”

Source: Jeff Brooks, [How to Turn Your Words into Money](#)



The #1 fail on a visit



“ Talk too much about how wonderful things are since your organization got involved... and you leave out the problems your donors can solve.”

Jeff Brooks,
How to Turn Your Words into Money

9 Strategies to Get the Visit

Call

Email

Video email

Text

Message through LinkedIn (“I’m going to call you to set up a time..”)

Meet donor at event

Another donor introduces you

Call to say thanks

Call to invite them to event





SMILE the WHOLE time

“I’m calling our most loyal (faithful, generous) donors to thank (discover, update, invite) ...

“I’m inviting my favorite (closest, smartest) friends to come discover (meet)...

Prep before the call

When,
where, and
plan B

p.s. we are setting an
appointment, not
making the case/ask
on the call.





Scan the QR code to nail the ask!

Rachel Muir's Virtual Tools to Delight, Stand Out & Know if Your Message is Getting Through



Rachel
MUIR

WiseStamp - Be recognizable!

- Personalize your email signature file
- Cost?
- 100% FREE!
- www.wisestamp.com

To

From Rachel Muir <rachel@rachelmuir.com> ▾

Subject



Rachel Muir, CFRE

Keynotes, custom training & retreats

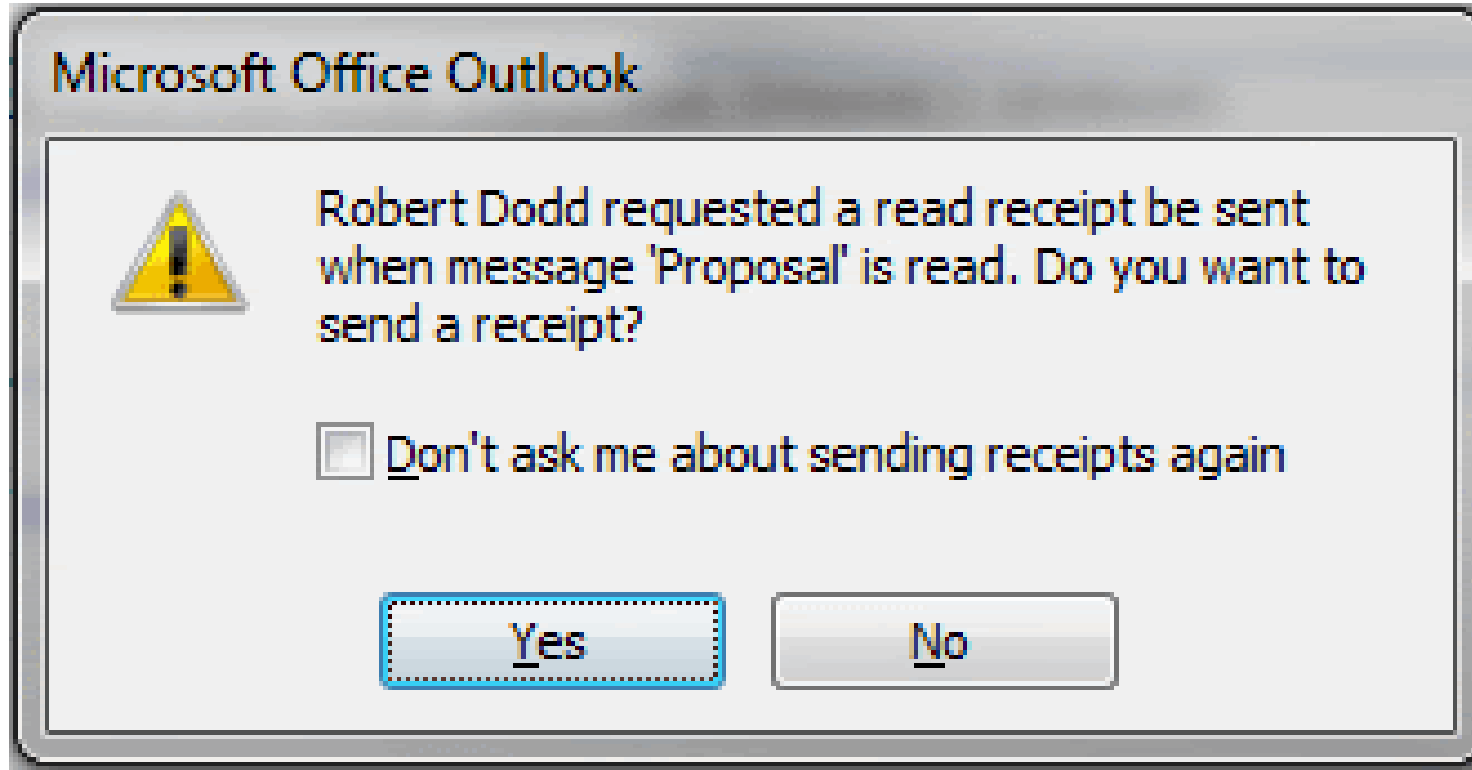
(512) 970-7983 | rachel@rachelmuir.com

www.rachelmuir.com



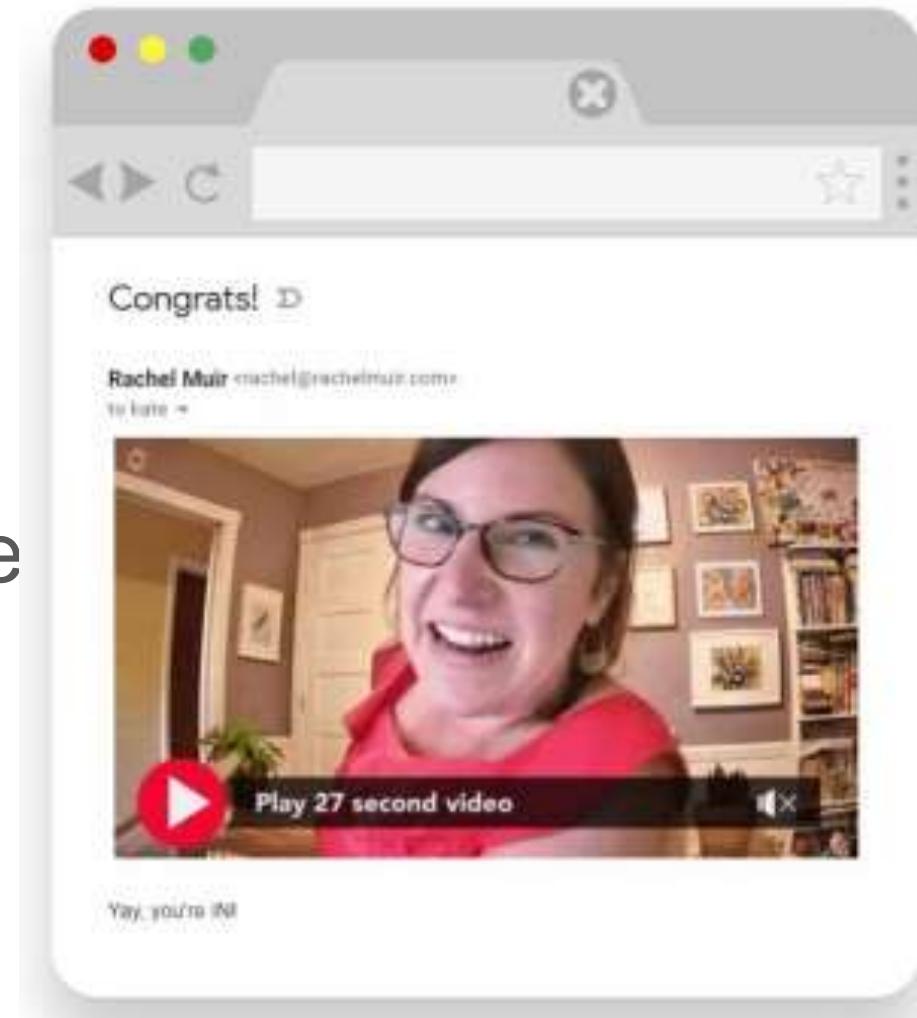
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Wish you knew donors read your email?



Video email

- www.BombBomb.com
- Record videos straight from your inbox!
- Send from gmail or outlook
- Tracks opens
- Uses your webcam or camera on mobile phone
- Perfect for getting (virtual) visits & stewardship
- Record directly from your email or use branded email stationary with your logo



Bomb Bomb video email



[Click to play this video.](#)

Aloha Brooke,

I got your name from Lynne Wester, the Donor Guru!

I am doing some preliminary travel planning for a fundraising conference I've been invited to keynote June 24-26 2020 in New Zealand (FINZ). I'd love to meet with you and explore any opportunities to travel to Hawaii to do a fundraising training in June, perhaps as a special workshop?

You can learn more about me here: <https://www.rachelmuir.com>



Like Write a reply... Send



Julie Edwards
Executive Director
Humane Society of Northeast Georgia
770.532.6617 x233
JEdwards@HSNEGA.org
<http://www.HSNEGA.org>



Care and Share Food Bank
Phone: 719-528-1247
development@careandshare.org
<http://www.careandshare.org>

Care and Share Food Bank for Southern Colo

Post gala behind the scenes thanks

Kellie Trenkle ktrenkle@genevaroseburg.com via genevaacademyroseburg.onmicrosoft.com

May 1 (1 day ago) ☆

to ▾

Good evening, Geneva Hero!

A quick note to say **THANK YOU SO MUCH** for your invaluable generosity at our [2018 Growing Tomorrow's Leaders Gala](#)! Pretty INCREDIBLE (and I don't mean Hulk ~ although there were plenty of those Sat night!) what a room full of folks like you can do on one super-powered night for these kids! Thank you so much for your part in their Journey! It's Worth It!

Have to tell you this, too...

Did a little math over the weekend and tallied the total \$\$\$ that your gifts generated, sooooo I went to campus first thing this morning to capture YOUR direct impact on these sweet kiddos! You've got to see their faces when Mr. Turner announces it! Check 'em out in this video (and hear that number yourself!)



Get the slides -> www.rachelmuir.com/handouts

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<input type="checkbox"/>	☆	»	Alicia Berruti	Inbox	Your Webinar Recording - S. Cascade Ave #700, Colorado Springs, CO 80903 This email was sent to rachel@rachelmuir.com. If...	12/18/19
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<input type="checkbox"/>	☆	»	Womenspace .. Rachel 8	Inbox	I'm grateful for you - training for Cascades Raptor > Center. Heather is out of town until late next week but I'm going to see > if I...	12/12/19
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<input type="checkbox"/>	☆	»	Alicia Berruti	Inbox	5 Gratitude Videos to Send for More Meaningful Business - S. Cascade Ave #700, Colorado Springs, CO 80903 This email was ...	12/9/19
<input checked="" type="checkbox"/>	☆	»	BombBomb 5	Inbox	Julie Collins opened Loved spending time with you last week! - your email Cascade Raptor Center TRACK IT Email sent Novem...	12/8/19



Do donors like it?

Amber Aiton aaiton@gssn.org via gssn.onmicrosoft.com

10/20/17

to rachel, Rori, Harriet

Hello, Rachel!

Just a friendly hello to say how much I enjoyed meeting you at the Girl Scout Philanthropy Conference, and how grateful I am for your suggestions, insights, and rock star donor engagement ideas.

I sent my first-ever Bomb Bomb (below) to someone who I have been trying to connect with for FOREVER. She immediately wrote me back asking if she can buy a table to our upcoming gala fundraiser!! (She has also officially opened the video six times. This tool is truly something awesome.)

Thank you, thank you, and keep being you 😊

Happy weekend,
Amber



Amber Aiton
Director of Development & Communications
Girl Scouts of the Sierra Nevada
[605 Washington Street](#)
[Reno, Nevada 89503](#)
T: 775-322-0642 x1232

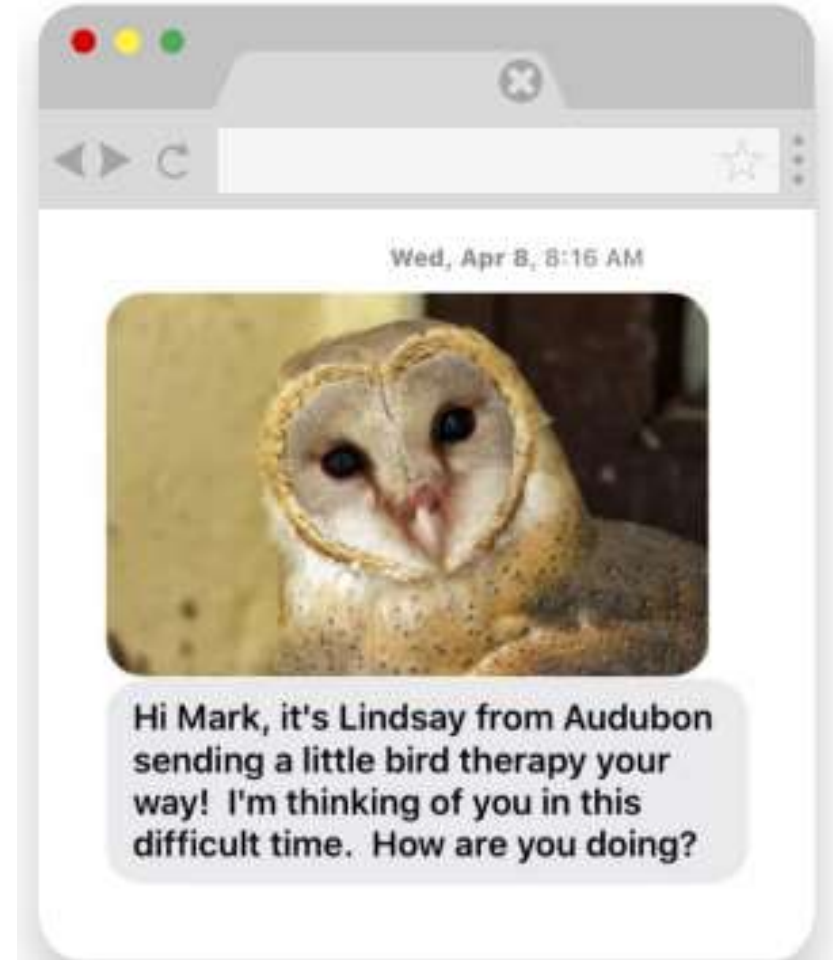
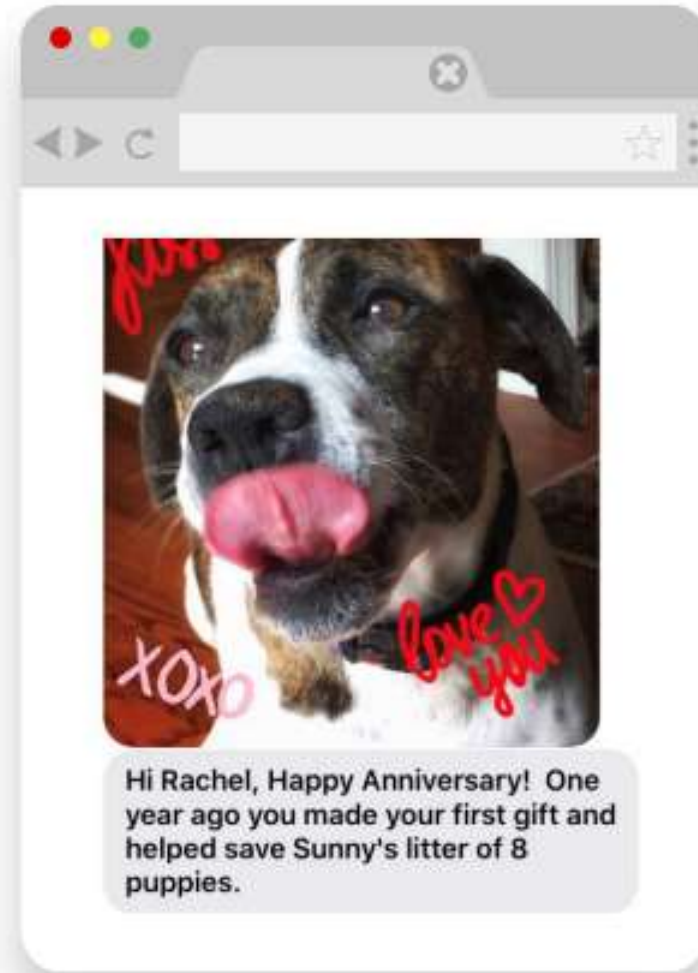
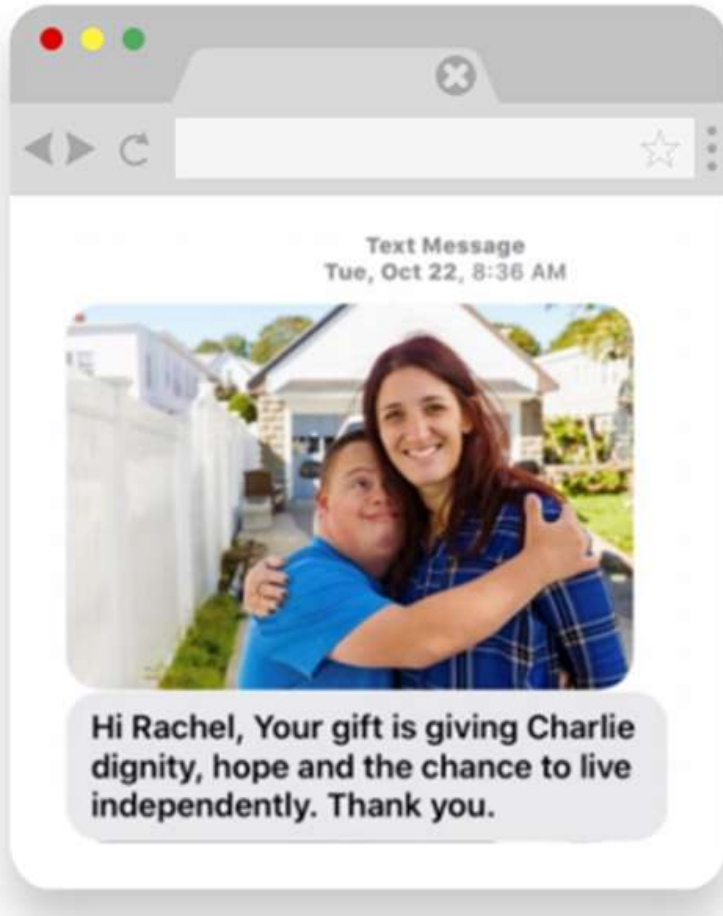


Chad Landers CSCS @ChadLanders · 17h

Huge props to @CarissaGump2008 and @NSCA ...I've donated to many causes, but only one thanked me with a personal video message! 🙌



Imagine getting a text like this from a charity...



Why use texting for stewardship?

- Open rates average 98%
- #1 most popular feature on smart phone
- New iOS feature “Silence Unknown Callers”
- 95% of texts from businesses read within 3 minutes
- 8x’s more likely to get response than voicemail or email
- 86% of people over 50 connect through text
- 94% of seniors (70 & up) send text messages weekly



**ACTIVITY: OVERCOMING OBJECTIONS TO
THE VISIT**



Scan the QR code to nail the ask!

“

If you can get the visit you have an
85% chance of getting the gift.

Jerry Panas, Asking

 RachelMuir.com/ask 



LIFE HACKS TO BOOST YOUR

CONFIDENCE

Feeling nervous before a call or visit?



Get the slides at rachelmuir.com/handouts



VS

HIGH POWER POSES



POWER POSES



After 2 minute power pose



TESTOSTERONE
DOMINANCE



CORTISOL
STRESS



Sample Script to Nail the Ask

“Sally, I’m on the board of this terrific organization, The Nora Project. One of my tasks is to raise money. I was hoping you could help with a donation of \$500. If you have other priorities, I certainly respect that. But I hope you can help.”



Source: Andy Robinson,
What every board member needs to know, do and avoid

Set goals for your visit

The donor
will feel...

The donor
will know...

I will
know...



How do I know how much to ask for?

What data can inform the ask?

FREE DATA/TOOLS YOU ALREADY HAVE

- Reports from your CRM
- Google
- Event attendance
- Social following
- NOZAsearch.com
- Zillow.com
- Politicalmoneyline.com
- Guidestar

DATA YOU CAN PURCHASE

- Analysis of giving data
- Marketplace data (donor wealth & demographic information)
- Wealth overlay (gleamed from public giving data)

HOW MUCH TO ASK FOR

- Major gift is typically 10-20x an annual fund gift
- Americans typically give 2-3% of their income to charity
- Past giving
- Giving to other agencies
- Professional context
- Wealth screen
- Income producing assets

What should I be prepared to answer?

1. How will their gift be used?
2. How is the project/program being funded currently?
3. Who else is being asked for the gift?
4. Why does the gift have to be made now?
5. Will the project be completed or the program started if the fundraising goal is not met?
6. Have your board members contributed to your organization?
7. How much does the organization spend on fundraising?
8. What percentage of their gift will be spent on the program versus administrative expenses?
9. Have corporations, foundations and government entities been asked to give?
10. Why do you work for the organization?

Explore – Ask – Explore

“Before I tell you about ...
I’d love to ask you some
questions...”

“I noticed you always give to the ___
program. Why is that your interest?
Where does that come from in your
life?”

Arc of the Ask



Approaches to the ask

WRONG

- Talk AT the donor
- “We’re so great...”
- Introduce need
- Ask donor
- Silence
- Donor responds

RIGHT

- ASK donor questions
- “Tell me more”
- Donor tells you
interests, you respond
“I’m happy to hear that
because you might be
interested in...”

Be specific.

Aim high.

Ask for a specific amount:

"Can we count on you for a gift of ____?"

"How would you feel about a ____ donation?"

"Would you be willing to contribute X?"

Be quiet. Let the donor ANSWER your question.



What if they say no?



WELCOME TO

REJECTION

STAY STRONG



“SHAKE IT
OFF!”

Amelia

Don't take rejection personally

“No” is just a
word.

“No” tells
you...

- How to get the timing right
- How to get the amount right
- How to get the project right

Amount?

Timing?

“No.” Is it the....

Project?

Person?

How to probe a “no”

As we were talking you seemed to indicate a great interest in the Girl Scouts. Am I right about that? (**organization**)

The more we talked the more I felt you were passionate about our _____ program. Is that right? (**project**)

I suggested you might want to consider a gift of \$10,000. Am I correct about that? (**amount**)

Turn objection into objective

“So our objective is to figure how you can give the gift you want to make while spreading the pledge payments to make your tuition payments easy. Is that it?”

“I can’t give to the campaign with 2 kids in college!”



Scan the QR code to nail the ask!

Thank you!



Wrap up
activity: 3
month map

- What did you learn that you want to put in place immediately?
- What is one thing you want to put in place in a month?
- What is one thing you what to put in place in 3 months?

A woman with long brown hair and glasses, wearing a bright green short-sleeved top and a gold necklace with a circular pendant, is sitting on a brown leather couch. She is looking slightly to her right with a pleasant expression. In front of her is a black laptop. To her left is a colorful pillow with yellow, orange, and red sections. To her right is a white pillow with the text "GOOD VIBES" in bold black letters. The background is a wall with a light-colored, repeating fan-like pattern. A white speech bubble with a black outline is positioned above her head, containing the text "THANK YOU!".

THANK YOU!

rachel@rachelmuir.com

Slides-> rachelmuir.com/handouts

Questions?





RACHEL'S STEWARDSHIP & TOOLS

HALL OF FAME

“Donorversary”



Get the slides -> www.rachelmuir.com/handouts

“Donorversary” postcard back



WE'RE CELEBRATING THE ANNIVERSARY OF THE DAY YOU SAID I DO!

- I do...want to feed a hungry rescue!
- I do...want to save a litter of puppies or kittens!
- I do...want to help spay or neuter!
- I do...want to save healthy animals from dying in a high kill shelter!

Thanks to you, homeless animals like Walker, who came to us with two broken legs and was barely able to walk, got lifesaving surgery and a forever home. He can now be seen chasing balls at the dog park with his new family.

On behalf of all the animals you helped rescue, Happy Anniversary!



845 West Ridge Road, Gainesville, GA 30501
HSNEGA.org | facebook.com/HSNEGA
instagram @humanesocietynega
twitter @HSNEGA | 770-532-6617

**Greatest gift you can give
a donor is the gift of being
known by you**

Email thank you autoresponder with photo

Wow! Thank you

Inbox x



Christopher Aaby <lglforms-submissions@littlegreenlight.com>

Sep 22 (5 days ago)



to rachel

Dear Rachel,

Thank you for your generous support of Catamount Institute. Your recent contribution of \$25.00 helps to ensure that students like Kelsey (pictured) have access to high-quality outdoor education experiences.

It is only through the continued generosity of good friends like you, we are able to achieve our mission. Because of your generosity and thoughtfulness, underserved children in our community will have the opportunity to connect with nature.

Thank you!

Warm Regards,

Christopher Aaby
Executive Director
[719-471-0910 x106](tel:719-471-0910)



Thank you for being a valued supporter of Catamount Institute. Catamount Institute is a 501(c)3 nonprofit organization. Your contribution of \$25.00 is tax-deductible to the extent the law allows. No goods or services were received in return for this gift. Please retain this letter as a receipt of your charitable gift.



Get the slides -> www.rachelmuir.com/handouts

Dear John,

I am overjoyed to see such a generous first-time gift from you, and am honored to welcome you into our donor family.

Mr. Pickles is one of 200 dogs we will rescue this year. Mr. Pickles is a terrier/pit bull mix dropped off at our doorstep howling and limping because of an infected paw. He was malnourished, afraid of people, and in incredible pain.

John, you know that no dog is beyond hope. When we looked at Mr. Pickles we knew he was an amazing dog. Even in pain, he took treats from our staff and wagged his tail. He received emergency surgery from our vet clinic and was rehabilitated by our expert staff. Today, he's receiving daily obedience training classes from volunteers and spends time snuggling with our Development staff in between meetings.

Thank you so much – on behalf of Mr. Pickles and all the dogs we serve – for believing in second chances. We couldn't do this without you!

Please call me at (512) 452-1746 if you'd like to stop by the shelter and meet Mr. Pickles or one of our other amazing dogs or cats, and see your donation at work!

For the love of animals,

PRESIDENT's NAME, President
Anytown Pets Rescue

P.S. Your \$250 donation is tax deductible. Anytown Pets Rescue's tax id is #31-1595414.



**Best thank
you for a
new donor**

Donorcentric monthly giving receipt



Thank you, Rachel!

We are facing very uncertain times right now. But with your steadfast support, we will continue to serve the neglected and homeless animals who depend on kind-hearted people like you.

The homeless animals in our community, like Maggie and her babies (pictured), needed you to provide essential care and you opened your heart. Our team is dedicated to doing all we can to help as many as we can with all the resources we have, but we cannot do our work without YOU. The majority of our financial support comes from YOU, our friends in the local community, and your support is appreciated more than ever during this time of uncertainty.

Rachel, THANK YOU SO MUCH – on behalf of Maggie and all the abandoned, unloved animals we serve – for staying the course with us. I am so incredibly grateful and humbled by your big-heart and wish all the best for you and your loved ones now and always.

Sincerely,



Sam & the Rescues!

Development Director



Samantha "Sam" Threadgill,
Development Director

A: 845 W. Ridge Road
Gainesville, GA 30501



What if you could send handwritten cards without picking up a pen or licking a stamp?



Check out feltapp.com

Felt app.com

- Digitally created handwritten cards
- “Write” with your finger or stylus on mobile app
- Recipient gets printed handwritten card with stamp
- Upload your photos or use their designs
- Accesses your camera roll, Instagram feed, Facebook feed



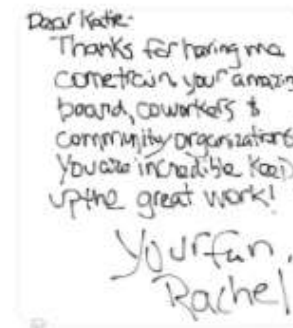
Felt Pricing

- Free 7 day trial to send up to 3 cards
- Send card with 1, 2, 3 or 4 panels
- Option - Pay per card \$4
- Option - Membership - \$6/month 3 cards up to 4 panels
- Option - Custom Branded stationery
- Extra \$1 for international

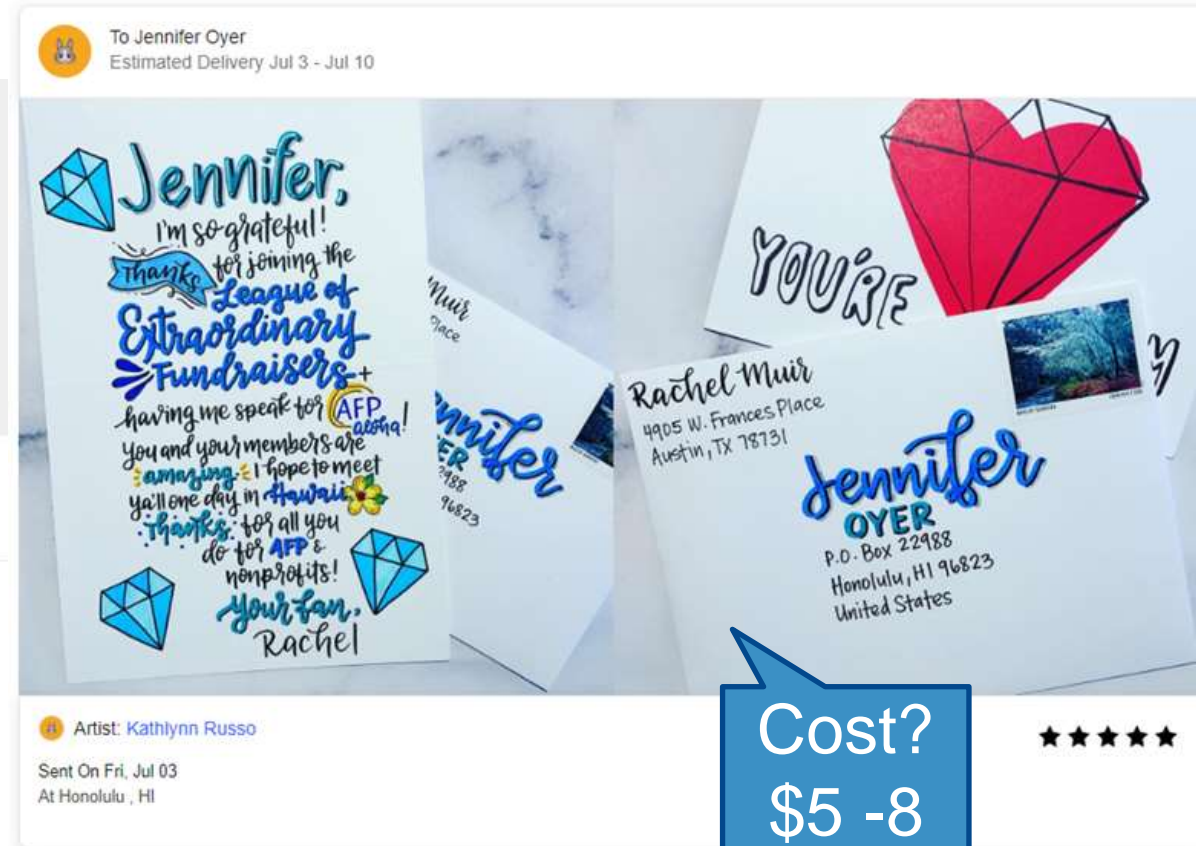
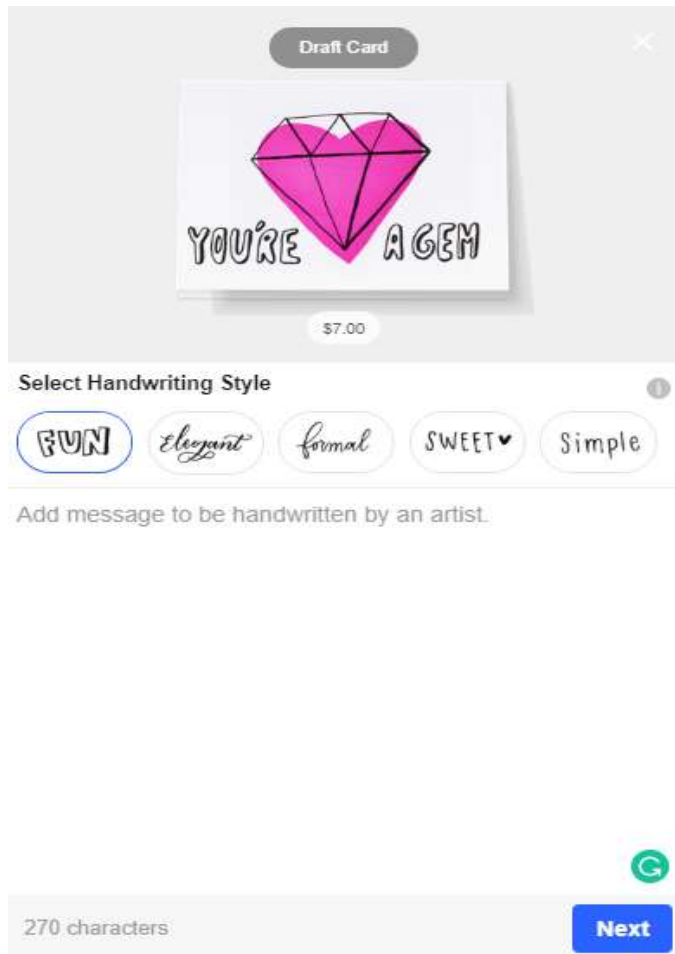


Learn more at feltapp.com

@rachelmuir

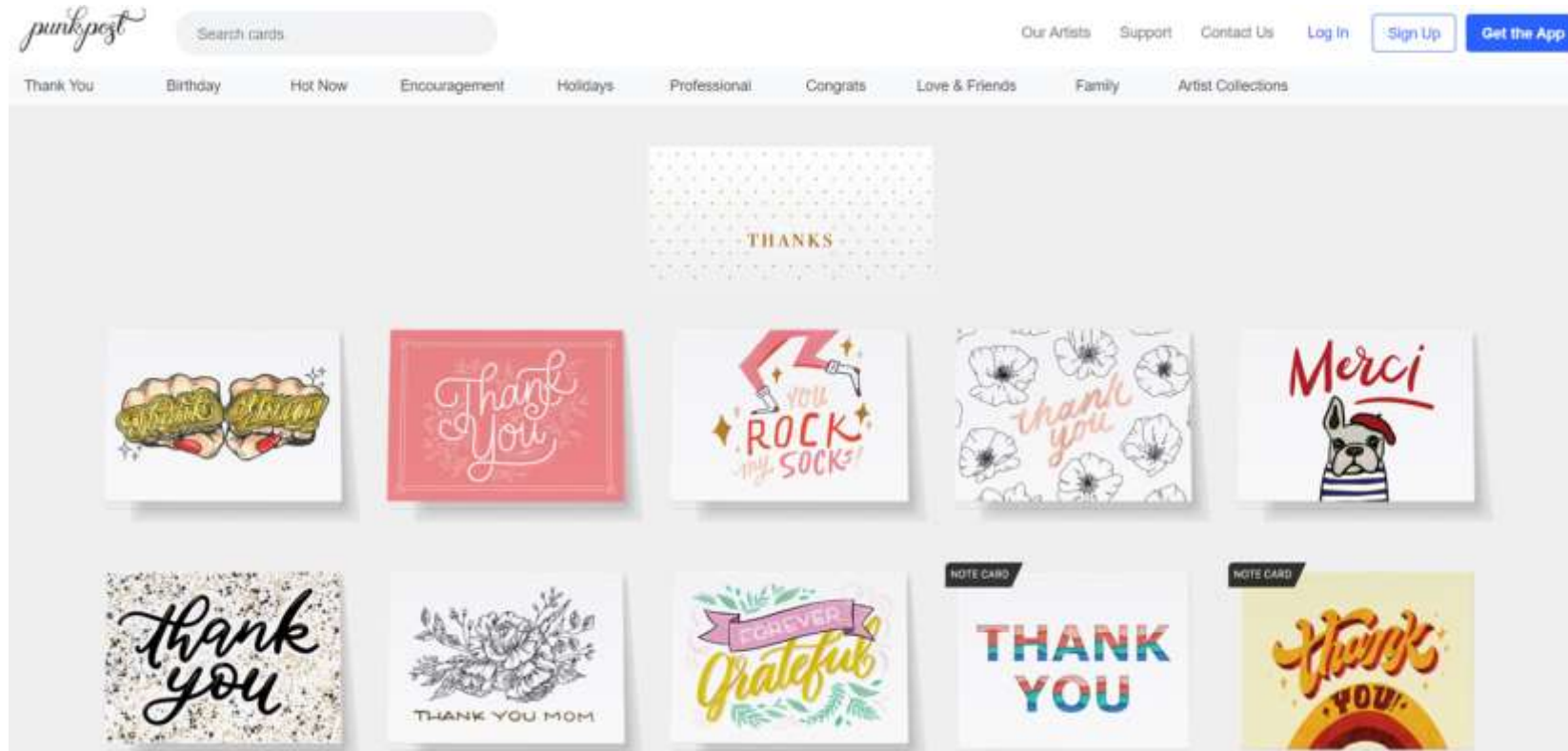


What if you could send handwritten cards drawn by an artist (without picking up a pen or licking a stamp)?



www.punkpost.com

www.punkpost.com



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A woman with long brown hair and glasses, wearing a bright green short-sleeved top and a gold necklace with a circular pendant, is sitting on a brown leather couch. She is looking slightly to her right with a pleasant expression. In front of her is a black laptop. To her left is a colorful pillow with yellow, orange, and red sections. To her right is a white pillow with the text 'GOOD VIBES' in bold black letters. The background wall has a light-colored, textured pattern. A white speech bubble with a black outline is positioned above her head, containing the text 'THANK YOU!' in bold black capital letters.

THANK YOU!

rachel@rachelmuir.com

Slides-> rachelmuir.com/handouts