

Strategies for Making the Ask

Once an advancement team has identified the revenue it needs to meet the organization's short-term and long-term goals and has segmented its supporter database by type and most recent year of gift, it is time for the team to put its plan into action. The only question that remains is how. Eleven strategies for making the ask can help advancement teams connect with supporters and prospects and bring in more money.

What to Ask for

A school's fundraising efforts should focus on the three major types of gifts: annual gifts, lead annual gifts, and larger gifts known as major, leadership, and transformational gifts.

Annual Gifts

Annual gifts are yearly gifts under \$1,000. Most initial annual gifts are made as the result of indirect appeals, such as email blasts or an envelope included in the quarterly newsletter. Engaged families, parents, and alumni are often appealed to as annual gift supporters.

They also play a role in urging their disengaged peers to contribute an annual gift, too.

Escale Tip: The gifts you solicit fund three different expenses: Operating expenses, special projects, and your school's endowment.

Lead Annual Gifts

Lead annual gifts are yearly gifts between \$1,000 and \$10,000. Most lead annual gifts are made through direct appeals, such as a personal letter, email, or call. Volunteers from the school's advancement team, sometimes with the assistance of current supporters, are responsible for soliciting lead annual gifts from engaged families, parents, and alumni.

Major, Leadership, and Transformational Gifts

Major, leadership, and transformational gifts are large gifts between \$30,000 and \$1 million or more. Major gifts are typically between \$30,000 and \$100,000 over three years. Leadership gifts are between \$100,000 and \$1 million over three years, and transformational gifts are \$1 million or more over three years. Advancement teams use the moves management process to identify prospective supporters. Soliciting major, leadership, and transformational gifts takes time, dollars, energy, and a personal touch from advancement team staff and volunteers as well as school leadership.

Whom to Ask

A successful advancement campaign uses supporter data to prioritize whom to ask for gifts.

LYBUNTs

LYBUNTs are people who gave to your school Last Year But Unfortunately Not This year. They represent the most opportunity for your current advancement campaign. LYBUNT major, leadership, and transformational gift givers are your first priority, followed by LYBUNT lead annual and annual givers.

SYBUNTs

SYBUNTs are supporters who gave to your school Some Year But Unfortunately Not This year. They are an advancement team's next priority after LYBUNTs. SYBUNTs respond well to "We Miss You!" messaging. Target major, leadership, and transformational SYBUNTs first.

Escale Tip: When you reach out to prospects, don't forget to answer the three main questions that build your case for support: *Why? Why Us? Why Now?*

Current Year Supporters

A school's current supporters should be given the same priority as SYBUNTs in an advancement team's solicitation strategy. Current year supporters may be asked to bump up their typical gifts. Reach out to major, leadership, and transformational current year givers first.

NYBUNTs

Distant past supporters and people who have never given to your school fall under the NYBUNT category. Past NYBUNT supporters have not given to your school in the last five or more years. NYBUNTs are your last priority in your advancement program. Indirect appeals are best used for reaching NYBUNTs.

How to Ask

Once your advancement team has determined the number of major, leadership, transformational, lead annual, and annual gifts required to meet its revenue goals and made a prioritized list of the prospective supporters to reach out to, it is time to make the ask. The following strategies are listed in order of most time and effort-intensive to least.

Moves Management In-Person Visit



For LYBUNT, SYBUNT, and Current Year major, leadership, and transformational supporters, a visit with the school leader, board member, or advancement staff member is the most effective way to make the ask. This is eyeball-to-eyeball communication done in-person (not virtually) for a half-hour or more.

Moves Management Phone Visit



A personal call from an advancement team staff member or volunteer is an effective way of keeping in touch with LYBUNT, SYBUNT, and Current Year major, leadership, and transformational supporters. Regular phone calls throughout the year to these supporters helps build your school's relationship with them and help your team know when the time is right to make the ask.

Moves Management Mail



Like a personal call, a personalized letter from an advancement team staff member or volunteer is an effective way of keeping in touch with LYBUNT, SYBUNT, and Current Year major, leadership, and transformational supporters. Sending a personal letter one or two times a year can keep your school top of mind with its top supporters.

Moves Management Email or Text



A personal email or text from an advancement team staff member or volunteer also helps your team stay in touch with LYBUNT, SYBUNT, and Current Year major, leadership, and transformational supporters.

Events



Homecoming weekend, galas, and other school events are excellent opportunities to engage all of your supporters. Make a plan for how you will personally connect with major, leadership, and transformational supporters at each event you host. Options may include reserve seating with the school leader or board members, VIP parking, and other perks. Lead annual and annual gift supporters should be invited to all of your school's events, too.

Direct Call



Trained staff members, volunteers, and board members can use a script and call list to reach out to supporters. Current lead annual givers make excellent direct callers, since they can ask prospects to give at their giving level. Direct phone calls are more successful at converting prospects into supporters than direct mail, though it can be used as a follow-up tool to email and mail campaigns. Target LYBUNT, SYBUNT, and NYBUNT annual givers with direct calls first. Then, move on to LYBUNT, SYBUNT, and NYBUNT lead annual givers.

Direct Mail



Direct mail appeals work well for lead annual and annual gift givers. Mail merge can be used to send direct mail campaigns as long as the letter is addressed to each individual recipient. Use your school's database to segment your list by LYBUNT, SYBUNT, and NYBUNT givers. You can deploy direct mail campaigns aggressively to capture more initial gifts if your school has not previously reached out via direct mail.

Direct Email and Text



Direct email and text campaigns work in a similar way to direct mail campaigns. Volunteers should target lead annual LYBUNT, SYBUNT, and NYBUNT givers first. Major, leadership, and transformational supporters who need additional attention are also good candidates for direct email or text campaigns.

Mass Mail



Mass mail campaigns, such as quarterly newsletters, annual reports, or other mail, reach a wide audience and are a great way to stay top-of-mind with all supporters and prospects.

Email, Call, and Text Blasts



Mass emails, automated calls, and text blasts are not personalized to recipients, but like mass mail, they help keep your school top-of-mind with your list. To execute a successful email, call, or text blast, your advancement team will need to consistently collect the email addresses and phone numbers of supporters and prospects. Segmenting your send lists can help you tailor your message to parents, alumni, and other groups of prospects.

Inbound and Outbound Marketing



Inbound and outbound marketing includes your school's website, online and print advertising, and anything else that draws people to your organization and increases your school's brand awareness in your community. These strategies can reach all supporters and prospects, but the message is not personalized.

Closing Thoughts

Knowing how to ask for gifts is just as important as knowing whom to ask for gifts. Successful advancement teams incorporate these specific strategies into their broader plans. Coupled with a clear case for support and a solid understanding of supporters' affinity for your school, their capacity to give, and their readiness to give, these strategies will help you convert prospects into longtime supporters.