

NEWS AND ANALYSIS

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# Getting Friends to Give

By NICOLE LEWIS

## Charities help key supporters conquer fears of soliciting others

Elizabeth Davis has long supported the Vermont Food Bank as a donor and

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a board member. But when the charity asked her to persuade her family and friends to help finance a new warehouse, Ms. Davis hesitated.

Ms. Davis knew that one of her uncles had the wherewithal to make a large gift, but the thought of asking him to give money -- even for a good cause -- made her nervous.

Nevertheless, Ms. Davis agreed to try so long as Deborah Flateman, who heads the food bank, came along on the visit to solicit her uncle. She warned Ms. Flateman that she might get stuck when it came to asking for the money. "I'll try, but if it doesn't come out, just do it," Ms. Davis said.

Although Ms. Flateman did end up asking for the money, Ms. Davis's show of commitment to the food bank and its goal of building a new warehouse made a difference. A week after the visit to her uncle, the food bank received his pledge for \$6,000.

"I started crying when Deborah called and told me," recalls Ms. Davis. "It definitely got me psyched and thinking, Who else can I call?"

On her next solicitation visit to a family friend, Ms. Davis made the fund-raising request herself - and landed another \$1,000 for the charity.

Raising money from friends can cause high anxiety among charity board members and volunteers, but some nonprofit groups have come up with ways to help smooth the process. Not only do charity officials volunteer to go along on fund-raising visits, but they practice mock solicitations and offer other assistance to make volunteers comfortable.

People don't like to talk about money because it can feel like "prying too much" into private matters, says Marla Bobowick, an official at the National Center for Nonprofit Boards, in Washington, who travels the country to help trustees learn about their responsibilities.

Some fund raisers worry that their friends may feel pressured to give and become resentful. Others fear rejection from the people they know. But the rewards of using personal relationships to help raise money can be great if the appeal is handled in the right way.

"It's pretty icky at first making those phone calls. The first few times it's really awful, but it's so satisfying when people say yes," says Katherine Franke, co-chair of the board of the International Gay and Lesbian Human Rights Commission, in San Francisco. "The more you do it, the more comfortable you are at it. Definitely practice and having some success helps."

Ms. Franke says that for birthdays and other holidays she gives her friends and relatives memberships with the charity, which cost \$35 each, as a way to introduce people to the organization's work. The charity has also successfully recruited donors to hold fund-raising parties at their homes and invite people they know.

The charity estimates that more than half of its roughly 2,000 donors initially became involved with the group as a result of a personal connection.

Many groups would like to emulate such success. "We've maxed out all the other ways we can think of for raising funds," says Rosalynne Reynolds, executive director of Advocates for Homeless Families, in Frederick, Md. "We really find that this piece is the one that is missing -- going about and creating a small army of people to ask people for money for the organization."

Learning how to approach a friend or colleague for a donation is the first step. Successful solicitors recommend making it clear upfront that the purpose of a proposed meeting will be to discuss a gift, so the friend doesn't end up feeling ambushed or used. They also emphasize that everyone asking for a donation should already have made a financial contribution, to signify a personal commitment to the group.

Annie Ellman, co-founder and head of the Center for Anti-Violence Education, in Brooklyn, N.Y., used to feel so uncomfortable asking her friends for donations that she would put several issues on the agenda when she arranged meetings. But that strategy proved distracting to her primary goal of raising money.

"If people know exactly why they are being asked for the meeting, and they say yes, they will meet with you. And usually they will give you the money," she says.

Ms. Ellman also recommends beginning such a meeting with an anecdote about one aspect of a charity's work that is most likely to match the friend's interests.

The goal should be to get friends excited about the charity's mission and work, agrees Pamela M. Barrett, president of Hospice and Palliative Care of Greensboro, in North Carolina. "If you expect someone to give because of your personal relationship, that's not going to be effective," she says. "They have to catch some bit of the fire" of the organization.

Ms. Barrett adds that there is a right and a wrong way to spread enthusiasm for a cause. "The right way is to share your excitement and ask them to participate," she says. "Arm-twisting and that kind of quid pro quo is the wrong way."

## **Persistence Helps**

Even when the request is presented just right, friends may still say no. When that happens, fund raisers must gauge whether to push the request or step back.

"People should err on the side of being a little more persistent, but not rude or disrespectful," says Stephanie Roth, a fund-raising consultant and co-publisher of the *Grassroots Fundraising Journal*, in Oakland, Calif.

She says that the person seeking a gift can turn some responses that sound negative into opportunities to discuss the gift. For example, if friends say they have already committed their charitable dollars for the year, solicitors can ask to talk about the possibility of a future gift. If friends say the organization doesn't sound familiar, solicitors might respond by offering to provide more information.

Ms. Roth says trustees and volunteers should be told to act themselves -- and that they don't have to use aggressive sales tactics when talking to friends. "There is this stereotype of the sliminess of fund raising," she says, "and I say to people, 'Look, especially if you are talking to your friends, you don't want to come across that way. You want to come across as, This is an opportunity to join something you'd feel good about -- not, I'm trying to trick you into giving away lots of money to something because it's my cause and not yours.'"

Perhaps most important, says Frederick C. Nahm, a senior fund raiser at the Colonial Williamsburg Foundation, in Virginia, is to make sure a solicitation does not lead to the end of a friendship. He urges solicitors to tell friends that it's acceptable to say no to a request for money. Tell them, "I'll love you even more because you are honest with me," he says.

## **Specific Needs**

Many fund raisers say it's easier to ask friends to donate to a specific project than to seek help for general operating expenses because it is clearer how the money will be used. However, some organizations don't have tangible projects, so they have found that it works to ask casually for small gifts with a specific, practical use in mind.

When a wealthy friend asked Judy Sjostedt, executive director of the Parkersburg Area Community Foundation, in West Virginia, how her new job was going, she didn't hesitate to mention that the office sorely needed a laptop computer. The friend promptly donated money to buy the computer and other equipment. In turn, she put him on the mailing list in the hopes that after he learned more about the group he would consider making a larger gift.

"If people know you are not greedy, when they see an opportunity for them to help in a larger way, they will come forward if you don't abuse the friendship in the interim," says Ms. Sjostedt

Often deciding how much to request emerges as the trickiest part of a solicitation meeting between friends, fund raisers say.

"It's difficult to properly target the amount to ask for," says Ms. Barrett of the hospice, in Greensboro. "We don't want to be presumptuous, but we want to give individuals the opportunity to give to their level of capacity."

Ms. Roth, the Oakland consultant, suggests trying to discover how much friends have contributed previously to other causes by examining charities' annual reports and special-event programs that list donors based on the amount they contributed.

Each solicitor handles this issue a bit differently. For the Cleveland Center for Contemporary Art's fund-raising reception this spring for friends of board members, Elizabeth C. McNeece, the development director, plans to ask all who attend for the same sum in case donors compare notes.

Nicky McIntyre, a fund raiser at the Global Fund for Women, in San Francisco, which provides grants to grass-roots groups, knows her friends don't have a lot of money. So instead of asking for a specific amount, she invites them to give a gift that is meaningful to them. "We expect everybody in the organization to give," she says. "And we expect our friends and family to give if they can, at the level that they can."

### **Training Essential**

Charities can play a significant role in helping novice fund raisers overcome the anxiety associated with asking friends for money by providing training, information, and encouragement.

Many small groups engage in role-playing, asking solicitors to practice making a pitch and responding to possible objections. Ms. Ellman, of the Center for Anti-Violence Education, finds role-playing helps her solicitors gain confidence. "The most important thing is for people to get the

training they need," she says. "If people do things that are very uncomfortable for them, it's really too much of a push, and then it doesn't become a good experience."

Some charities also try to ease the pressure on board members and other volunteers by sending a charity official along on fund-raising visits. The official often has more detailed knowledge of the organization and can answer any specific program or finance questions that arise.

For groups like the International Gay and Lesbian Human Rights Commission, however, which has board members scattered around the country, it is usually not possible for a charity employee to go on fund-raising calls. To assist its board members, the human-rights group compiles a packet of information that is updated annually, with answers to frequently asked questions about the group and major selling points.

Some charities designate a specific time of year to emphasize solicitations among friends. Advocates for Homeless Families identifies a three-month window during which the emphasis is on approaching friends to give -- with the idea of building excitement around solicitation time and reducing the burnout that can happen if people think they always need to be seeking gifts.

### **Encouraging Volunteers**

Ms. Reynolds, the executive director, also sends an acknowledgment letter to solicitors every time one of their contacts contributes. "That way they get feedback about their success," she says. "It's important to keep encouraging people."

In addition, charities must not wear out solicitors by expecting them to keep asking the same contacts for contributions year after year, experts say. After the initial gift, the charity should take responsibility for keeping the donor interested in the cause.

"You have to have a whole plan in mind of how you are going to continue to involve these people so that they do make larger and larger gifts and, in turn, will bring in others," says Laura Fredricks, a fund raiser at Temple University.

If charities do not forge relationships with those new donors, contributions will dry up if the donor's friend stops volunteering for the charity.

When the charismatic board president of the Cleveland Center for Contemporary Art stepped down, the donors he had attracted promptly stopped giving. That made the charity realize it needed to make extra efforts to attract donors, such as holding receptions at the museum. "You have to find a way to build relationships with donors that live beyond the donor's relationship with the solicitor," says Ms. McNeece, the development director.

Ms. Roth, the Oakland consultant, agrees. "Almost anyone can get their friends to give a one-time gift. It's the organization's challenge to convert these people to become loyal to the organization, and not just give because of a connection with a friend."

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