

Making the Ask!



With this technique you will:

- Remove the anxiety
- Convey confidence
- BE confident
- BE comfortable
- Have fun!



Technique assumes:

- A strong case for giving exists
- Prospect has seen case prior to ask
- Prospect has been accurately researched
- Prospect has been sufficiently cultivated
- This is not the first time you've laid eyes on each other



To optimize our ask,
we need 3 things.

1. Solicitor Training
2. The Right Mindset
3. Tools



Why Solicitor Training?

Remove the anxiety of making calls by using a methodology that helps solicitors to be comfortable and effective:

- ▶ Methodical call planning and organizing
- ▶ Systematic call appointment making
- ▶ Practice sessions
- ▶ Confidence that prospect is well-cultivated and, with diligent prospect research, will be expecting the ask in the range that will be presented

Training

**Through practice and role play,
become comfortable.**

- ▶ Ask for an appointment to meet for a face-to-face call
- ▶ Direct the meeting so it focuses on the ask
- ▶ Ask for a specific major gift (without mentioning an amount!)
- ▶ Specify a timeline for an answer
- ▶ Follow up with a written thank you



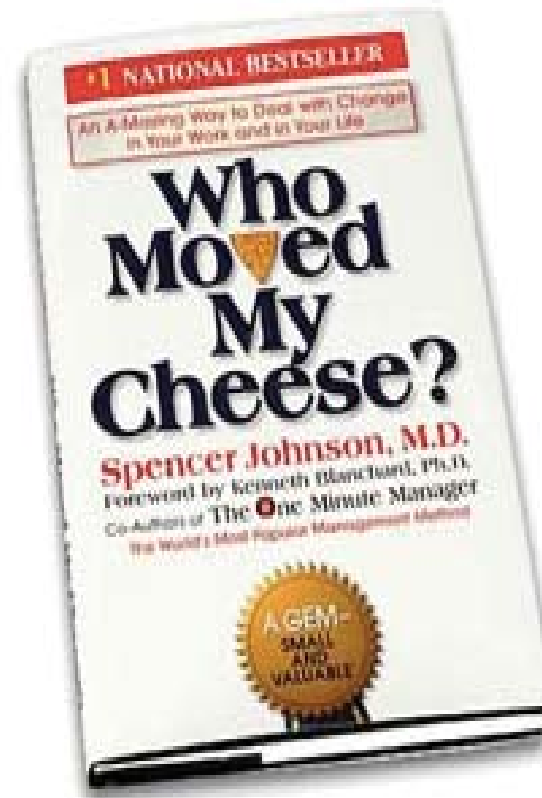
Training

When you're doing the actual call:

- ▶ Bring along a staff or other informational support person if necessary
- ▶ Have a well cultivated donor – ready for the ask
- ▶ Have a need that interests the potential donor
- ▶ Perform “Gracious Fundraising” using the “point and ask” method
- ▶ Leave behind a personalized packet of information

Mindset

ALL Stress, ALL Anxiety...Is FEAR!



Tools

Packet Review

Solicitor Packet

- Personalized letter
- Pledge form (individual or business)
- FAQ sheet
- Stock brochure
- Planned gift brochure
- Giving opportunities
- Solicitor check off list (leave home)
- Making appointments
- Making a call
- Meeting planning
- Sample thank you note

Donor Packet

- Personalized letter
- Pledge form (individual or business)
- FAQ sheet
- Stock brochure
- Planned gift brochure
- Giving opportunities

Bring two personalized packets to the fundraising meeting and leave one behind with the prospect.

Personalized Letter

Use the
"Magic Words!"



The Campaign for the Alberta Bair Theater
Go beyond enjoying the arts, SUPPORT THE ARTS!!

Alberta Bair Theater
Officers and
Board of Directors

Bill Gottwals
President

Brooke Murphy
President Elect

Doug James
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Ron Yates
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Hollis Edwards

Allyn Hulberg

Laurence R. Martin

Michael Sanderson

Denise Scherer

Jim Swain

Liz Wilmouth

<date>

<name of board member>

<address>

<address>

<city> <state> <zip?>

Dear <first name>,

Thank you for your hard work, dedication, and passion as a board member. Your involvement has helped guide and strengthen the efforts to support and sustain the Alberta Bair Theater as it worked to establish a world-class Performing Arts Center in Billings that supports jobs, stimulates the local economy, and enhances the quality of life throughout the entire region.

As a board, we are committed to working together towards raising funds to provide the capital projects, operations, and programming resources that will be needed to enhance the performing arts experience for our patrons and artists. We know that in order to be successful, we will have to set a new pace of giving as a board. This will enable us to inspire others to join us in supporting the Alberta Bair Theater at generous gift levels, higher than might otherwise be expected.

While it is difficult to determine what an appropriate request is, we hope you will consider naming the Main Stage.

- Main Stage at \$2,000,000
- Enhanced Auditorium at \$1,000,000
- New Lower Lobby at \$750,000

As a board member and as an early supporter of this fundraising initiative, you are helping the Alberta Bair Theater bring to the region a new level of experience, opportunity, and impact. Please join us in making a significant gift and help us achieve 100% participation from our board. We will return to pick up your pledge form at your convenience.

If you have any questions, please feel free to call us. Your support at the level you feel is appropriate is very much appreciated. Thank you!

With appreciation,

Name, Title

Name, Title

Alberta Bair Theater • P.O. Box 1556, Billings, MT 59103 • 406-294-5204

Pledge Form

Don't leave money on the table.



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Pledge/Gift – Individuals

Yes! I / We are pleased to make a commitment of \$ _____ to the Alberta Bair Theater Capital Campaign, which includes funding for capital projects, operations, and programming.

Enclosed is a check for \$ _____ made payable to **Alberta Bair Theater**.

Please contact me about contributing appreciated stock.

The balance of this pledge will be paid over:

- this year two years three years four years five years

REMAINING PAYMENT OPTIONS:

Option 1 Please send reminders to me annually, beginning (month and year) _____

Option 2 Please charge my: Visa MasterCard

I would like to be charged \$ _____ one time only or

annually beginning (month/year) _____

NAME ON CREDIT CARD CARD NUMBER 3-DIGIT EXPIRATION

- We are interested in the following Naming Opportunity: _____
- We prefer to forego the naming opportunity.
- We prefer to remain anonymous.
- My company's matching gifts form is enclosed.

Thank you for your support!

All contributions to Alberta Bair Theater, a nonprofit, 501(c)(3) organization, are tax deductible to the fullest extent allowed by law.

William R. Wood, ABT Executive Director

Date _____

We appreciate your generous support and we hope that you will continue to support us with annual gifts and through patronage of our events and programs!

NAME(S) _____
(as I/we would like my/our name to appear in printed materials)

ADDRESS _____ CITY _____ STATE _____ ZIP _____

DAYTIME PHONE _____ EVENING PHONE _____ FAX _____ EMAIL _____

SIGNATURE(S) _____ DATE _____

Please return original to: Jan Dietrich, Director of Development
 Alberta Bair Theater • P.O. Box 1556, Billings, MT 59103 • 406-294-5204



Stock Brochure

Comparing the benefits of giving the Alberta Bair Theater cash or appreciated securities:

Cash

A gift of cash is the simplest way to make a contribution to ABT. Cash gifts are deductible for income tax purposes up to 50% of your adjusted gross income. A gift in excess of that limit can be carried forward as a deduction for up to five additional years.

Securities

You may find it more beneficial to give securities that have appreciated in value. If you sell appreciated securities, you will incur a taxable gain. By giving ABT securities that have been held more than 12 months, you will receive a double tax benefit:

- you avoid capital gains tax on the appreciation, and
- you receive a charitable income tax deduction for the full fair market value of the assets.

Gifts of appreciated securities are deductible up to 30% of your adjusted gross income. A gift in excess of that limit may be carried forward as a deduction for up to five additional years.

Procedures for giving securities:

When the security is held by you, please call and ask for instructions:

Jan Dietrich, Director of Development
Alberta Bair Theater
406-294-5204
jdietrich@albertabairtheater.org

When the security is held by your broker or bank:

- The securities can be transferred electronically to the account of the Alberta Bair Theater.
- Have your bank or broker phone Jan Dietrich for instructions as to how this can be accomplished.
- Send your broker written confirmation of your verbal instructions promptly, and send a copy of this letter of transmittal to Jan Dietrich at ABT — giving your name, address, what and how many securities are being transmitted, and the purpose of your gift. Having that information will expedite recognition of your generosity.

This is in no way intended to be tax advice. Tax laws can and do change year to year, and we recommend that you consult your tax advisor when considering a gift of appreciated securities.

The advantages of giving appreciated stock to the Alberta Bair Theater



Alberta Bair Theater
P.O. Box 1556
Billings, MT 59103
406-294-5204

Planned Gift Brochure

Comparing the benefits of giving the Alberta Bair Theater cash or appreciated securities:

Cash

A gift of cash is the simplest way to make a contribution to ABT. Cash gifts are deductible for income tax purposes up to 50% of your adjusted gross income. A gift in excess of that limit can be carried forward as a deduction for up to five additional years.

Securities

You may find it more beneficial to give securities that have appreciated in value. If you sell appreciated securities, you will incur a taxable gain. By giving ABT securities that have been held more than 12 months, you will receive a double tax benefit:

- you avoid capital gains tax on the appreciation, and
- you receive a charitable income tax deduction for the full fair market value of the assets.

Gifts of appreciated securities are deductible up to 30% of your adjusted gross income. A gift in excess of that limit may be carried forward as a deduction for up to five additional years.

Procedures for giving securities:

When the security is held by you, please call and ask for instructions:

Jan Dietrich, Director of Development
Alberta Bair Theater
406-294-5204
jdietrich@albertabairtheater.org

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Making a Fundraising Call



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Making a fundraising call on an individual

Please work with Jan Dietrich to develop specific strategies for the call and prepare materials for you to use on the call and give to the prospective donor, including a personalized letter ready for your signature.

1. Make an appointment for a **face-to-face meeting**. Solicit gifts in a thoughtful manner, not casually. Phone calls or letters are not the best if you expect a significant gift.
2. **Be prepared and brief**. Know as much about the prospective donor as possible. Be clear about the amount or range of money you are requesting.
3. **Be confident, positive, and passionate**. You are not begging. You are sharing an opportunity to enhance the community, a project the prospect has already supported or expressed an interest in.
4. **Focus on the prospect's interests/needs**, not the Alberta Bair Theater's needs. Examples: demonstrated interest in downtown revitalization, economic development, quality of life, theater, film, music; trying to retain and recruit an educated work force; investing in downtown real estate; has a child who is major in the performing arts; has a personal interest in seeing good performing arts events and film in the downtown . . . (You will be provided with this kind of information before you make the call.)
5. **Up front, ask for a specific amount or gift range**. "We would like you to consider one of the following Naming Opportunities . . . which will give you an opportunity to . . ." Where appropriate, mention a need or goal of the prospect which the gift will satisfy. Allow time to discuss it.
6. **Do not fill the silence after you make the request**. Give the prospect a chance to respond. Then, continue based on the response. Involve him/her/them in the development of the idea/proposal so the donor is emotionally involved in its success. Everyone wants to be a worthwhile member of a **worthwhile organization**.
7. You can mention that the amount requested may be high or low. Say, "it is only a suggestion." "Only you know what is an appropriate and important gift for you . . ."
8. Say "thank you" and follow up with a letter of thanks. Even if the prospect turns you down. A thank-you letter gives you the right to ask again.
9. Promptly, **report the results of your call** to Jan Dietrich. Discuss the next steps. Also, please send a copy of your thank you letter to Jan.

Thank you!

Questions? Please ask Jan Dietrich, Director of Development • Alberta Bair Theater
 P.O. Box 1556, Billings, MT 59103 • 406-294-5204

Thank You Notes

Remind
them of
what you've
asked for
and that
you're
coming
back.



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Sample Thank You Note – Board
Campaign:

<date>

Dear

Thank you for taking the time to meet with <____ and> me to talk about a gift to help fund The Alberta Bair Theater capital projects campaign. As you know, we are asking you as a board member to make a financial gift to the campaign at a level that is personally significant to you. We hope you can help the board set a pace of giving for this campaign that will ensure its success and inspire others to do likewise.

As discussed, I will drop by next Tuesday at 4PM to pick up the signed pledge form. Please do not hesitate to call me at _____ or Jan Dietrich at 406-294-5204 if you have any questions or need further information.

Sincerely,

<signed>



The Campaign for the Alberta Bair Theater
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Sample Thank You Note – Board
Campaign:

<date>

Dear

You have set a wonderful example for the whole board with your participation and support in the various events that have gotten us to this point, and I appreciate your consideration of major support now. As you know, when we go out to the greater community, the measure of our support as board members will set the tone for everything else.

I am available for questions at any time, and as we agreed, I will come by to pick up your pledge form next Tuesday at 4PM.

Thank you again for your time and consideration. I look forward to talking with you soon

Sincerely,

<signed>

Thank you!

Susan Palmer

103 Catron Street, #63

Santa Fe, NM 87501

413-297-3619

susan@palmerwestport.com

www.palmerwestport.com



You never call!
You never write!