



Donor Research And Call Time

Goals



Know how to **Prospect Donors**



Know how to have a successful **Call Time**



Know how to make a **Hard Ask**

Prospecting Donors

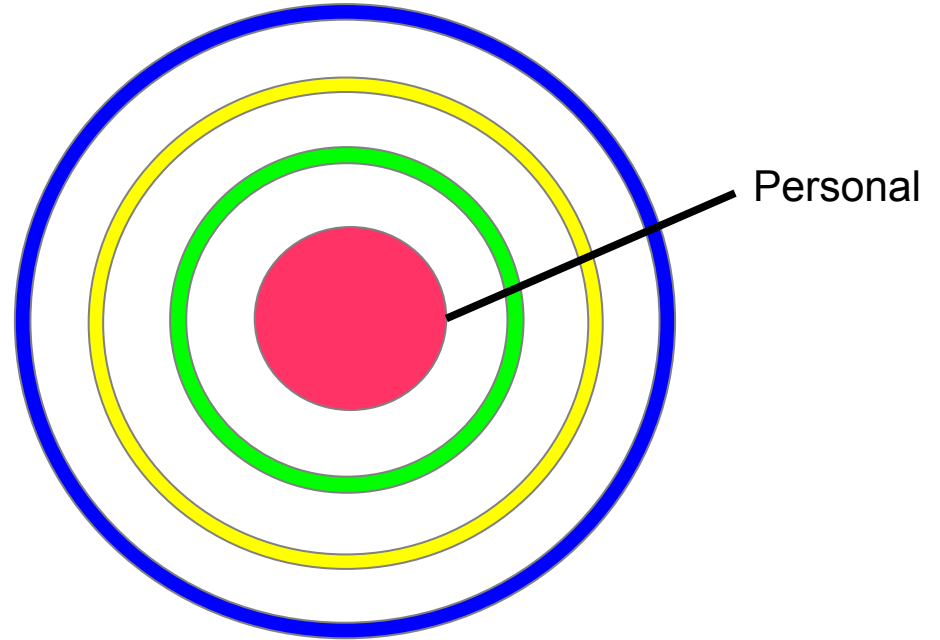
Prospecting Donors

- Circles of Benefit
- Research Past Donors
- Recruit a Committee

Circles of Benefit

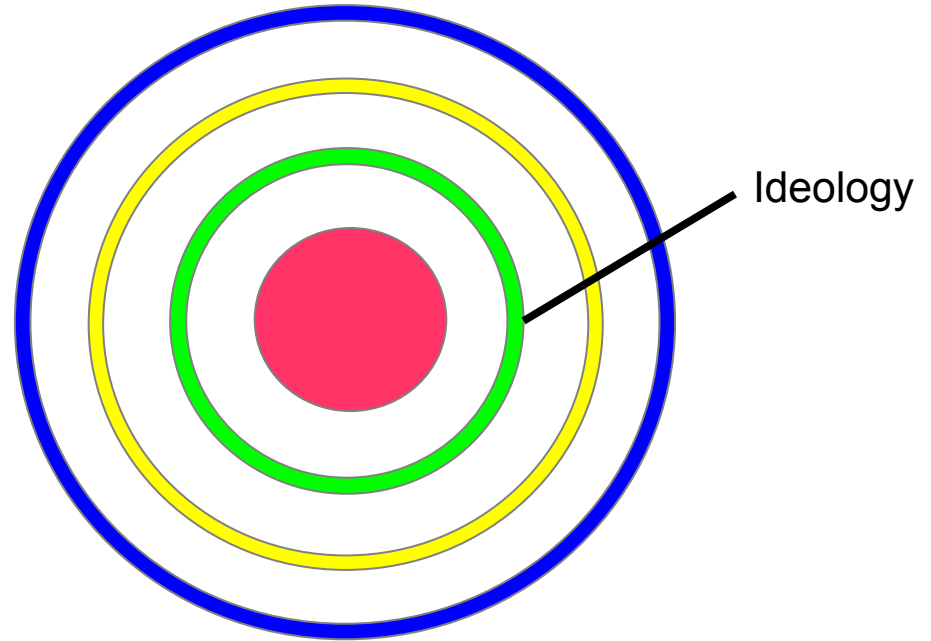
Personal circle

1. Friends, family, and professional contacts of the candidate



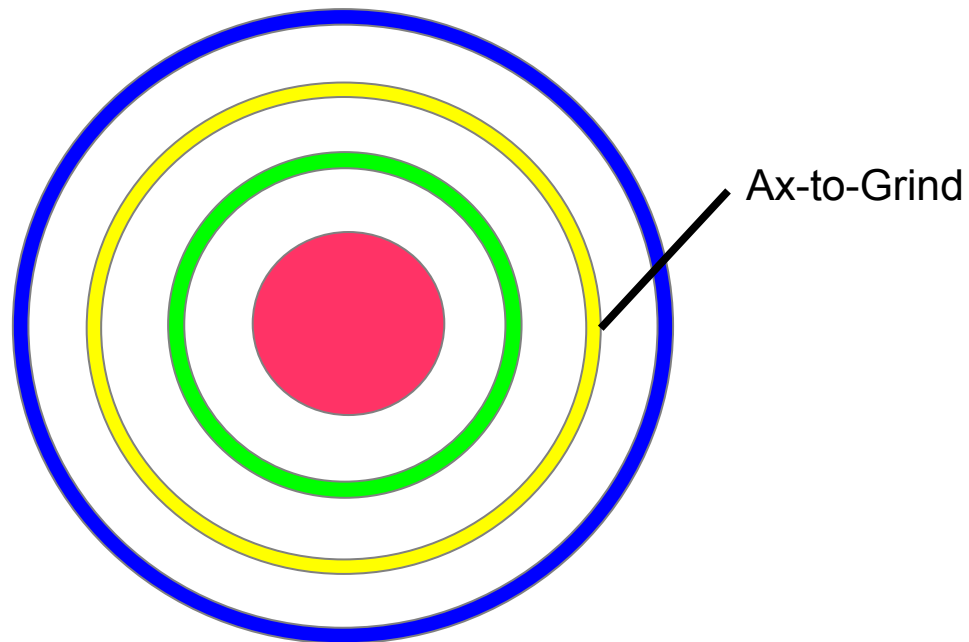
Ideological Circle

2. Donors
who care strongly
about one or several
specific issues



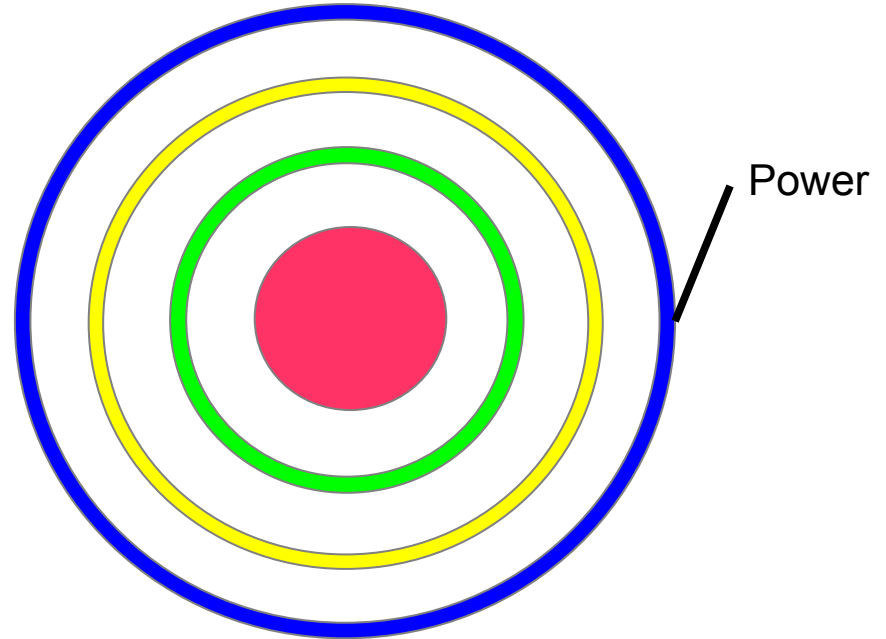
Ax-to-Grind Circle

3. Donors who have a strong negative feeling towards your opponent



Power Circle

4. Donors who give to advance institutional or economic interests



Research Past Donors

Donor History



TEXAS ETHICS COMMISSION

Promoting Public Confidence in Government

Recruit a Committee

Finance Committee

- Committee Member Buy-in
- Built in support
- Expanded Networks

Committee Member Buy-in

- Finance Committee members should be committed to making recurring high-dollar donations

Built In Support

- Finance Committee Members should be willing and able to host events at their homes and/or help plan for a major event.

Expanded Networks

- Finance Committee members will be able to tap into their own personal networks to bring more investment to the campaign.

Call Time

Why Call Time is Important

- **Face-to-Face:** 50-70% response, very low cost, quick return, time intensive, for large donors.
- **Call Time:** 30-50% response, very low cost, quick return, time intensive, for medium to large donors
- **Events:** 15% response, low cost, slow return, time intensive, for all donors.
- **Online:** .02% response, low cost, quick return, moderate time, for low dollar grassroots donors.

How to have a successful Call Time

- Prepare your lists carefully
- Set Goals and Benchmarks
- Know why you're calling
- **Keep Call Time Sacred!**
- Take notes
- Debrief
- 'Thank You' Notes

Prepare by researching each donor:

- Name
- Title
- Address
- Work Phone
- Cell Phone
- Home Phone
- Email
- Short Bio
- Giving History
- Family

Prepare call list

Jump into NGP and look up past donor

Set Goals and Benchmarks

- Example Goals:
 - Make 50 calls in 2 hours
 - Raise \$500 in pledges
 - Talk to 20 donors

Research First, Ask Second

- What connections do you have to this person?
- Where do they work?
- Who have they given to before?
- What do they care about? Find common ground.

Know why you're calling

- Talk about you and why the campaign is important to them
- Make a specific ask

Keep Call Time Sacred!

- Avoid rescheduling
- Avoid interruptions
- Eliminate distractions



Take Notes

- What did the prospect say?
- Was the prospect interested in the conversation?
- Did they sound happy?
- What was the result of the ask?
- Did you learn any personal information to follow up on in the future?

Debrief

- System and self evaluation
- Did you meet your goals?
- What went well?
- What could be improved?

'Thank You' Notes

- Always send BMDs 'Thank You' notes
- 'Thank You' notes maintain a friendly relationship with donors.



Hard Ask

Nervous about Asking for Money?

GET OVER IT!

You're not just asking for money - you're offering people an opportunity to participate.

Have the Right Mindset

- Be ready to hear “no” and do not take it personally.
- Be confident and unapologetic.
- Have a clear and concise theory of change.

Critical Fundraising Skill: The Hard Ask

- Know your hard ask going in. (PRACTICE)
- Asking is deliberate, specific, confident - not apologetic.
- Successful asks always recognize the self interest of the person being asked
- Make some easy donor calls first: family, friends, etc.

Anatomy of A Hard Ask

1. Build Urgency
2. Use Strong Language
3. Ask for Something Specific
4. Ask and Shut Up
5. Always get something
6. Be Persistent
7. Hold People Accountable

Debrief



What were your key takeaways?



Why is it important?



How will you apply this in the future?