Annotated Agenda

**Grassroots Fundraising: Making the Hard Ask**

**TIME ALLOTTED: 1 hour**

**PRESENTER(S):**

**MATERIALS NEEDED:**

* Projector and PPT
* Butcher paper and markers
* Handouts: Making a Successful Ask
* Timer

**GOALS FOR THIS SECTION:**

* Understand the importance of grassroots fundraising to our organizing work
* Learn best practices for making a hard fundraising ask
* Feel prepared when you make a hard fundraising ask

**AGENDA**

**0:00 – 0:012 Introduction, Overview, Goals and Agenda**

0:00-0:03 Personal story introduction

* **[Slide 1]**
  + [Trainer should give a two-minute version of their personal story as relevant to this module. If possible, try to weave grassroots fundraising or the hard ask into your story. Don’t forget to share challenge - choice - outcome and practice it like any other section!]

0:03 – 0:08 Why is grassroots fundraising important?

* **[Slide 2]**
* Put simply, grassroots fundraising will allow us to run successful organizing programs in your state. But who can think of a few other reasons why including grassroots fundraising as part of our field program might be important?   
    
  [Take responses from a few of the audience about why GRF is important. Seek to elicit the below responses:

1. Expands our donor base to people who wouldn’t otherwise give
2. Gives local community ownership over organizing
3. Demonstrates popular support
4. Opens other paths for engagement with OFA]

* Great. A key point that you just mentioned is that grassroots fundraising opens other paths for engagement with OFA. Think of a jungle gym – we can approach it from a number of different ways, right? Unlike a slide, people can come on from different sides at the same time. So while some people will take action with OFA by attending a rally, others will take action with OFA by making a financial contribution or hosting a fundraiser.
* One of the biggest barriers to leading a successful grassroots fundraising program is the taboo about asking for money -- It’s important to note that this is a learned behavior. We can overcome this barrier by recognizing that people give when they are asked. People who give money are going to give it somewhere, so it is up to us to invite them to give to OFA and become involved in our work. With that being said, let’s jump into our goals for this session.

0:08 – 0:10 Goals

* **[Slide 3]**
* The most efficient way to fundraise for any cause is to include a “hard” ask when soliciting supporters. At the end of this session our goal is that you [read from slide]:
* Understand the importance of Grassroots Fundraising to our organizing work
* Learn best practices to making a hard ask.
* Feel comfortable making a hard ask and are ready to start raising money to help your state achieve its goals

0:10 – 0:11 Agenda

* **[Slide 4]**
* So let’s go over what we’re going to do in this session.
* After we get through introductions, we’ll put fundraising in context by discussing the “Circles of Benefit” and why people donate to different causes
* We’ll dive deep into making a hard ask.
* Practice fundraising conversations with a hard ask.
* And then we’ll debrief and wrap up.

0:11 – 0:12 Agenda review

* **[Slide 5]**
  + So now that we’re past Introductions and Goals, let’s jump into the “Circles of Benefit” which will help us better understand prospective donors. Adding context to prospective donors will, of course, help us make a hard ask.

**0:12 – 0:25 Circles of Benefit**

0:12 – 0:15 Why do people donate?

* **[Slide 6]**
* In order for us to know how to ask for support, we first need to first think about the reasons why someone might contribute to an organization – any organization.
* Let’s popcorn style this. What are some reasons why you might donate to an organization?
  + [Take responses from a few of the audience about why GRF is important. Seek to elicit the following responses:
* Because they’re inspired by someone or an something
* Because they believe in your cause
* Because they disagree with your opposition
* To be part of a community
* To receive recognition
* AND most importantly
* Because they’re asked to. ]
* **[Animation cue]** Great! [If there are any answers on the slide that the participants didn’t say, highlight that. Otherwise emphasize that people do something only when someone asks them!]
* This is really at the core of why anyone would contribute to any organization, charity, campaign, etc.

0:15 – 0:19 Circles of Benefit

* **[Slide 7]**
* EMILY’s List has a diagram to help candidates put prospective donors into context. It‘s a great diagram and is applicable to our grassroots fundraising at OFA. As a volunteer fundraiser, YOU can put yourself at the center of the diagram.
* A few key things to note: The kinds of donors who give – and when they give – is determined by the kind of donor they are. So what does this mean? Picture yourself at the center of this diagram. You are the fundraiser. And donors are all broken into these different circles or categories.
* Personal – Your personal contacts.
* Ideology – People that care about your organization’s mission.
* Ax to Grind – People or organizations that care about stopping your opposition.
* Power – Institutional organizations that have a formal solicitation process.
* What this means is that the donors closest to you, require less convincing so they are likely to contribute to your cause faster than all of these other groups. Why? Because they care about you and want to support YOU.
* For instance, if I asked a personal contact like my older brother for a donation, he is more likely to give quickly because when I convey the importance of his gift and the urgency behind giving now, he will likely go ahead and do it. When he donates, he’ll be doing it because he cares about me and he will do it quickly because he knows it will help me.
* Someone that I don’t know personally, but that I know cares about the cause, will likely require more convincing. You will need to provide concrete examples about your team’s work and why that work moves the cause forward.
* With limited resources, we will be most successful as grassroots fundraisers if we focus on the Personal circle and the Ideology circle. Other departments at OFA HQ are responsible for these other groups.

0:19 – 0:24 Personal & Ideological Circles

* **[Slide 8]**
* What kind of people would fall into the personal category? Remember, these are people that will likely give first.   
  [Have an assistant come up and jot down responses from the group onto two sheets of butcher paper – 1 for personal circle and 2 for the ideological circle]
* First Circle of Benefit: Personal [Take a few responses and try to elicit the following:]
* Family and friends
* Friends of family and friends
* Holiday list
* Neighbors
* Former employers, employees, colleagues
* Fellow parishioners
* Alumni
* What kind of people would make up the second?
* Second Circle of Benefit: Ideological [Take responses and try to elicit the following:]
* Donors
* Activists
* Members of allied organizations

0:24 – 0:25 Agenda review

* **[Slide 9]**
* So now that we know the motivation behind our prospective donors, let’s talk about making a great hard ask for support.

**0:25 – 0:40 The Anatomy of a Hard Ask**

0:31 – 0:33 Fundraising is Organizing is Asking

* **[Slide 10]**
* Whether you are asking for:
* one-on-ones
* house meetings
* phone banks
* housing
* or any of the other things we ask for as organizers, there is one truth above all others:
* You get what you ask for, and not much of what you don’t ask for. A hard fundraising ask is just like a hard press ask. It’s just like a hard volunteer ask.

0:33 – 0:38Steps for GFR conversations

* **[Slide 11 + handout: Making a successful ask]**
* So, just like you’ve learned best practices for how to structure a conversation in organizing, we can identify similar best practices for how to have fundraising conversations.
* Starting with the red box, the first step is to tell the donor about the OFA mission statement, the work you are doing locally with OFA, and how it advances what the donor cares about. As the red arrow says, this is a really important time to start asking the donors leading questions about how they feel about policy issues or the President’s policy agenda, because it can give you insight into how to frame OFA’s work in the context of the donor’s values and interests.
* The next step, seen in the green box, is to give the donor reasons why they should give, and the impact it will make. This is a great time to start weaving in your personal story because the donor is more likely to care about the policy issue if he hears about how it impacts a real person, and especially the real person they are talking to!
* After that, let’s move to the purple box. Here you give the donor context about how their donation will be used. Make sure the donor knows the impact his donation will have on the state and local OFA organization. This is a good time to share OFA’s concrete accomplishments in issue organizing, prioritizing local accomplishments of your chapter and team. This will make your donor realize he’s making an investment that’s going to pay off with results!
* Looking now at the blue box, the next part of your conversation should explain the goal for the fundraiser or fundraising cycle you’re working on. This puts your donation ask in context and lets your donor know that his donation will work with many others to build to a substantial goal. Together, many small donors can raise a lot of funds!
* Finally, note at the orange box, your conversation should end with an ask for a specific amount. Ask the donor for an amount you think they’ll be able to give, based on what you know of their history. If they say that’s too much, ask for a smaller amount. If that is also too much, ask them what amount they can afford to invest in OFA. No amount is too small, and everyone who donates is joining the OFA team and contributing to our success as an organization.
* Think of this grid not as a script or a pitch, but as a through-line to your conversation. You should be asking questions and engaging the prospective donor in a back-and-forth conversation throughout your ask. These are points to hit as you guide your conversation, but not bullet points in a monologue!

00:38 – 00:40 Best Practices of Any Ask

* **[Slide 12]**
* So we have these bullets here that are best practices for making any kind of ask. [Give an example of a weak volunteer ask that your audience may be familiar with in your state. Then, ask your audience why it was bad and how it could be better. Have them draw on the bullets above to make your ask stronger.]

1. Know Your Audience
2. Pick an Effective Attitude
3. Build Urgency
4. Use Strong Language
5. Ask for Something Specific
6. WAIT for an answer
7. Be Persistent

0:40 – 0:41 Agenda review

* **[Slide 13]**
* So now that we know the motivation behind our prospective donors, let’s talk about making a great hard ask for support.

**0:41 – 0:50** **Practice Your Fundraising Conversation**

0:41 – 0:42 Set up the practice exercise

* **[Slide 14]**
* Ok, now let’s take the opportunity to practice having these fundraising conversations! Here’s what we’re going to do: we’ll role play one scenario where we talk to someone from the first circle – the personal circle and one scenario from the second circle – the ideological circle.
* While you practice, we’ll keep our best practices on the slide.
* For this role playing section, find a partner.[Once people have paired off, go over the first scenario]

0:42 – 0:46 Scenario #1: The Personal Circle

* **[Slide 15]**
* The volunteer fundraiser will be calling a colleague/friend/family member. The volunteer fundraiser wants to help OFA-[STATE] meet a fundraising goal at the end of the month. Pick your roles. You’ll have 3 minutes for your ask. When that’s done, your partner will have 1 minute to give feedback on how to make your ask stronger.

[At this time, walk around the room and try to keep an ear out for a really good group. Ask them to re-enact their conversation in front of the group.]

* **[Slide 16]** 0:46—0:50 Scenario #2: The Ideological Circle:
* The volunteer fundraiser will be calling a past campaign donor. This past donor gave every month to the campaign and voted for President Obama. The volunteer fundraiser is helping OFA-[STATE] meet a fundraising goal at the end of the month.  
  You’ll have 3 minutes for your ask. When that’s done, we’ll take one minute for the group to give feedback on your ask.

[At this time, walk around the room and try to keep an ear out for a really good group. Ask them to re-enact their conversation in front of the group.]

00:42 – 00:45 Scenario #1

00:45 – 00:46 Feedback

00:46 – 00:49 Scenario #2

00:49 – 00:50 Feedback

**0:46—0:60 Debrief and Closing**

0:46 – 0:56 Debrief

* **[Slide 17]**
* Before we debrief, who had a partner that made a really great ask in the first scenario – when making an ask of a donor in the Personal Circle? [When someone is nominated, have the pair go up to the front of the room and re-enact their conversation]
* Who had a partner that made a really great ask in the second scenario – when making an ask of a donor in the Ideological Circle? [When someone is nominated, have the pair go up to the front of the room and re-enact their conversation]
* OK. Great. Thank you for sharing!
* Let’s have an open conversation. How did you feel when you were being asked to donate?
* Was it more difficult to say no when the person making a hard ask hit all of these points?
* What are some of the points you feel you need to work on in order to make a great, hard fundraising ask?

0:56 – 0:57 Agenda review

* **[Slide 18]**
* So now that we know the motivation behind our prospective donors and have practiced, let’s go over our key takeaways.

0:57 – 0:60 Key Takeaways

* **[Slide 19]**
* Making a hard grassroots fundraising ask is just like making a hard organizing ask
* We have nothing to lose by making a hard ask when we remember to Respect. Empower. Include. Act.
* The success and growth of our organization depends on our ability to make a hard ask. Donors will not give if we do not ask.