



# The Activist's Guide to Personal Solicitation Fundraising

*By Morton C. Blackwell*



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Of the many ways conservatives raise funds for activities and organizations in the public policy process, only the following method, personal solicitation, has proved to be universally successful. That's why it's known as foolproof. And why it is famous.

I developed, practiced, and refined this technique in the early 1960s while a student at Louisiana State University in Baton Rouge. If properly asked, many people will gladly give contributions to support conservative activities. Such people can be found in every community and in every state, including yours.

Having taught the formula since 1962, I am confident of its success. I maintain an open-door policy with my students. Each student is invited to contact me if the formula doesn't work. No one using it has ever reported anything but success.

**Morton C. Blackwell**

*President, Leadership Institute*

## THE FIRST STAGE:

### Your budget

The first step in my Famous Foolproof Fundraising Formula is to make a complete budget for your program or organization.

This system works for funding single projects, but you'll raise a lot more money if you don't have to repeat the process for each project.

The budget should be reasonably detailed and easy to understand. Briefly and simply outline your budget so a person not affiliated with your organization can understand each entry.

The budget should be organized by category with a final total at the bottom. The budget should not be more than one typed page. Brainstorm with others to list all the appropriate expenditures.

In the Appendix are sample budgets. Your specific budget requirements will vary, but these provide a good base from which to start.

## THE SECOND STAGE:

### Identify the most likely donors

Next, make a list of people, both in and out of the local community, whom you believe are most likely to make substantial contributions to your cause.

Convene a few people who will be working closely with you. Have another brainstorming session.

Start by listing the best fundraising prospects already known to the people in your group. Then think of other sources of potential donors who may be willing to contribute to conservative activities.

You may consider those who have contributed to conservative candidates for public office.

Note: It is contrary to federal law to use the names and addresses of donors to federal candidates or federal political action committees for any commercial purpose if those names and addresses are obtained from the Federal Election Commission.

“Commercial” includes fundraising! You may not legally use FEC lists

for fundraising purposes. You'd break federal law and be subject to fines and criminal penalties if you did.

*Remember: you may not legally use FEC lists for fundraising purposes.*

However, at the state level, the required funding reports by candidates, political action committees, and political party organizations are not under any such prohibition in many states.

Find out which office in your state capital receives the reports filed by candidates, political action committees, and political parties. (Often it's the Secretary of State's office or the State Election Board.) Some state governments post this contributor information online. Ascertain for certain if it is legitimate in your state to use information from this source for fundraising purposes.

If it's legal in your state, you may go to the appropriate state agency and copy the names and addresses of each donor who has given substantial amounts of money to conservative candidate, political action committees, and party committees.

Even in the case of federal elections, the candidates and the campaign organizations have their own copies of lists they previously submitted to the Federal Election Commission in their periodic reporting records.

A friendly former candidate, winner or not, may legally allow you to use his or her list and to select from it the names and addresses of likely donors.

Another ready source of potential donors is conservative leaders in your local community. Ask them who likely donors are and how they can be contacted.

Even if you don't have many of the above sources, you can probably find enough good prospective donors to launch this program. With just a handful of conservatives at your brainstorming session, you should be able to come up with many good prospects.

Do not spend more than a day or so creating your initial list of prospects. You should pick out the top half dozen or so, those you think most likely to give substantial contributions to your organization.

Next, designate teams of two, preferably a man and a woman, to make an appointment with each person on the list.

## THE THIRD STAGE: Meet with potential donors

Many of your potential donors will have secretaries. A secretary can be a strong ally if treated with respect.

The secretary of a potential donor will probably ask, “Well, what is it you want to come talk about?” You should be reasonably frank in your response.

Respond with something to the effect of: “We are very concerned about the advancement of left-wing policies in our state. We would like to show you some of the things we are trying to do to correct this imbalance. And we would very much appreciate having your thoughts on the matter.”

The team of two should arrive slightly ahead of time for the appointment. Dress better than the average for a business meeting in your community. This will vary from area to area.

In a casual beach town, a little better than average may mean that you wear shoes. In other communities, a little better than average would mean that you would wear a suit and tie.

However, don't go overdressed to meet a potential donor. A conservative who solicits funds in a three-piece, heavy wool suit with a big gold-link watch chain looped across his vest may not be a credible grassroots leader.

Talented people are highly successful in personal solicitation. You should not send out utter klutzes who have not brushed their teeth since 2007. Donors respond best to intelligent people who have a pleasant demeanor and a solid plan of action.

When you arrive, introduce yourselves. Take some time to discuss with him or her where you're coming from philosophically. Describe the problems you are fighting. Ask about your prospect's philosophy.

Most people like to talk about their ideas. This will alert you to issues which motivate them to act.

Then take out your one-page budget. Hand it to him or her. Let him or her examine it carefully.

Prospects are usually people of substantial means. They quickly understand a clearly written budget. They'll be able to judge whether or not it's realistic.

Be sure not to include items for all-expense-paid trips to the Bahamas for sun and fun. Present a realistic and sensible budget.

Ask your prospect, "Does the budget contain any items which aren't clear? May we clarify any entries for you?" The prospect may well come up with one or two things which he or she doesn't understand.

Be prepared to defend each of the budget items, showing why each is a responsible use of money. If you're getting a cheap rate on something, point it out.

Once you're sure he understands the budget, look him directly in the eye and, with a pleasant expression on your face, say this important sentence: "We were hoping you'd be able to help us financially to meet this budget."

*You wait. If you have to wait thirty long seconds, wait. Silence is your ally.*

After you've said this, keep your pleasant facial expression and wait. You wait. And you wait silently.

If you have to wait thirty long seconds, wait. Silence is your ally. At some point, the prospect will eventually respond to what you've said.

The reply will fall into one of these three categories:

- 1 She may remark, "Well, I think it's a good idea, here's a contribution." And she'll make a contribution or pledge right there.
- 2 Or he may say some version of: "I'm sorry, I can't help you. I've got cancer, my wife is divorcing me, business is terrible, and my children are now being prosecuted for various crimes." If a prospect says he just can't give you any money, thank him for his time and input, then leave.
- 3 However, by far the most frequent response you will receive is something like: "How much are you asking me to contribute?" or "What are we talking about in terms of money?" In other words, the person will ask you how much to give.

Don't bother to solicit anyone for an activity whom you couldn't ask for at least \$100. Some people should be in the \$500 to \$1,000 range or even higher.

Always have a figure in mind before you meet with a prospective donor.

Most conservatives have never asked a perfect stranger for \$500 or \$1,000. But you shouldn't feel reluctant or awkward about this.

Well-known donors are often asked personally to make contributions. Major donors are not ashamed or embarrassed to be asked for \$1,000. So you shouldn't be ashamed or embarrassed to ask them for \$1,000.

If you're in doubt as to whether to ask a person for \$100 or \$500, ask for \$500. If in doubt between asking for \$1,000 or \$2,000, ask for \$2,000. Always ask for the higher amount in the range you think reasonable.

My experience has shown that rarely do donors give more than they are asked for; however, they often give less.

You may happen to misjudge a person's ability to give. You may ask her for \$2,000 although she's never given more than \$100 to anybody in her life.

This won't grossly offend her.

In fact, she may even chuckle, saying, "I don't know where you got the idea I could give \$2,000. I've never given more than \$100." Then ask for the \$100.

In the overwhelming majority of cases, when a donor prospect asks you, "What are we talking about in terms of money?" the dynamics of the Famous Foolproof Fundraising Formula make it inevitable that you will leave with some donation or a pledge.

Sometimes a donor will say, "I'm sorry. I'm happy to give you the money, but I can't give you anything until my stock dividend check comes in on the fifteenth of the month."

Offer to come back at his convenience to pick up his donation.

In any case, whether donors give you a check, cash, or a pledge, you should thank them genuinely. "We really appreciate what you've done for us. Because of you, we'll make a great impact in the public policy process."

## THE FOURTH STAGE:

### Expand your base of good prospects

Now you have the check in hand or a good pledge. And you've expressed thanks.

The next step is to say, "There is another thing you can do to help us. We'd greatly appreciate it if you would suggest others whom we might go see who might be willing to help us meet our goal."

The donor has already made an investment in your program, actually or with a pledge. That person made that donation because he or she wants you to succeed. If you don't get enough money to succeed, his or her \$100 or \$500 or \$2,000 may be wasted.

When you ask new donors for additional names, the great majority will give some to you. They will know many potential donors whom you do not know.

We all have different friends. Your new donor may know, among others, a conservative little old lady who lives at the edge of town in that ramshackle house with the broken down fence who happens to own 10,000 acres of Colorado timber on which they have just opened a big gold mine.

Your new donor will provide you with names. He'll say, "Well there's Dr. Johnson and Mr. Picklesimer." Make sure you carefully write down everything about the new prospects. "This is Dr. Jane Johnson, the orthopedic surgeon. This is Mr. Edward Picklesimer, who lives out on Green Hollow Road near the corner of Hammond Highway."

Make sure you have each prospective new donor identified very clearly. You don't want to go back to your new donor and ask, "Who is this person again? I can't find him."

A new donor will give you a few names, ordinarily a handful.

When he or she has finished listing names, ask him or her, "Can you think of any more?" Very often that first extra name will be the best prospect of all.

When the new donor finally runs out of names after you've prodded him or her a couple of times, you will have, on average, six or seven new names.

Almost everyone who gives you a donation will come up with additional names.

There is some other psychology involved in this. The donor thinks, “Well, these folks just hit me up; I’m going to send them down to hit up my old buddy Charlie, too.”

Your new donor will have friends with whom he does business or plays bridge or golf. Perhaps the donor will smile and send you to a friend of his who has recently raised money from him.

Once you have the names, look through the list and say, “Well, I know Dr. Johnson because she’s the one I went to last winter when I had a broken ankle. And we know Mr. Kelly because Susie’s husband buys a new car every year from Mr. Kelly’s Chevrolet dealership. But I don’t know Mr. Picklesimer and I don’t know this one or that one.”

Ask if your donor would be willing to call the ones you don’t know and give you an introduction over the phone. Say, “That way, when we go to see them we won’t be complete strangers.”

Again, in the overwhelming majority of cases, because the donor already has an investment in your project, he will be willing to make some calls for you.

Sometimes a donor will tell you she’ll write an email to introduce you. However, writing an email is an effort for most people. They delay writing emails, and many times, despite good intentions, never send the emails.

A telephone call is much easier than an email. But, if your new donor says she’s going to write emails, say, “Thank you very much. Would you please send me a copy of each email so I’ll know when to follow up?” You can then be sure when and if the emails are sent.

You will probably walk away from that first successful meeting with a contribution or a pledge and a list of other prospects.

Immediately after this meeting, take a moment to write down anything personal you observed about the contributor: key interests, spouse’s name, number of children, hobbies, secretary’s name, award certificates on the wall, etc.

A strong personal relationship with your donors requires that you learn as much as possible about them.

Write and keep a short summary of what was said in your meeting. Refer to these notes before any subsequent communications with the donor.

Your organization or campaign can purchase fundraising software or an inexpensive contact database. Either option should accommodate an unlimited amount of additional information about each contact you or your staff have with each donor, things you learn from correspondence, phone calls, visits with the donor, and research.

Within 24 or no more than 48 hours, write a warm letter of thanks to your new donor.

Handwritten thank you notes are more powerful than typed letters.

*Within 24 or no more than 48 hours, write a warm letter of thanks.*

All forms of thanks should give donors the credit for the good that is being done. Don't brag about what you do; brag about what the donor accomplishes through you.

To the extent you can do it, make each donor feel like a personal friend and team member. In practice, you will become personal friends with many of your donors.

It's been my experience that any conservative group which sets out on this kind of program soon has more good prospects for giving money than they have time to go out and ask.

The three requirements for achieving any project are time, talent, and money.

It doesn't cost much to raise funds by personal solicitation. Because you are volunteers, gasoline may be your only expenditure. You're limited only by the amount of time and talent you can put into this project. Within those limitations, the sky's the limit.

You will find there's a lot of money out there. Conservatives are genuinely concerned about what's happening in their communities. They're concerned about what's wrong in our country. They want to help you make good changes.

As you use this process, you will find that many people are delighted to see you. You may make friendships and political alliances with some which will last a lifetime.

## THE FIFTH STAGE:

### Re-prioritize

Choose another prospect from your list, the one you now think most likely to make a generous donation.

Make an appointment and repeat the third and fourth stages.

## THE SIXTH STAGE:

### Build strong ties with your donors

The majority of your subsequent communications with your donor should not be about money.

As often as you can, get donors personally involved in what you do. Attendance at an organization's events builds stronger relations with all donors present. Successful groups understand this well.

Here's a list of ways in which donors can participate personally in groups they support:

- meet your staff or volunteers
- go on a donor visit with you
- participate in a program or an event of yours
- participate in a video you produce
- be asked for advice on any matter
  
- write letters to their friends about the services you perform
- ask their friends to send you donations
- give a speech in behalf of your group
- visit your office site or headquarters

After each such participation, graciously thank the donor.

One almost universally successful way to sustain and increase donors' giving is to get them to visit your offices.

In such visits, donors meet the staff, who roll out the red carpet enthusiastically and gratefully. All staff should show that they clearly understand that the donors make possible all that the group does. The personal experience of such a visit sticks in a donor's mind.

A donor who had in 1997 given the Leadership Institute \$10,000 but had given nothing since, visited the Institute's Steven P.J. Wood

Building in 2000.

LI staff and I spent a lot of quality time with him. We explained what we achieve with donors' gifts. We gave him a first class tour of the facilities.

At the end of his visit, and without our even asking for a contribution, this donor left LI a check for \$500,000.

When you make a donor a part of what you do, you make it easy for him or her to contribute again.

My very first personal solicitation of this kind was when I was a junior at rural Woodlawn High School near Baton Rouge, Louisiana. We had a very small junior class of twenty-eight. Our school had never had a football team.

We students decided to raise money to pay for equipment in order to field a football team our senior year.

Some of us began to raise money through projects such as cake sales. I worked hard on a scrap metal drive, driving a truck to local farms, asking farmers if they had any scrap metal to donate for us to sell.

The biggest contribution we received was a check for \$500 from a very nice lady more than 80 years old. We were astonished at the size of the contribution, since it was not a rich area. And \$500 was worth a lot in 1955-56.

Before long, we raised enough money to buy the uniforms and equipment necessary for the football team. We scheduled a fried chicken banquet to celebrate.

We decided to honor the wonderful little old lady who had given us \$500. One of the students created a neatly drawn lifetime pass to the Woodlawn High School football games. We gave the pass, framed, to this lady at the celebration banquet. She was tickled pink.

We did not risk a great sum of money by awarding her a lifetime, free pass. But she loved it.

Just a couple of years later, this lady gave the school five acres of land adjacent to the school, on which the stadium was built where the Woodlawn High School Purple Panther football team played their home games.

And the reason she gave that land? Very simple. She felt a strong

personal tie with this football team.

People will strongly identify with your project if you thank them, involve them, inform them, and credit them with the good results they make possible.

*If you ask them for money at every meeting, then they will dread to hear from you.*

On the other hand, if you ask them for money at every meeting, then soon they will dread to hear from you. They will not give you appointments. You will not raise any more money from them.

But, if you operate on the basis I have outlined, you will almost surely be successful.

When you get each contribution or pledge, you should immediately write a strong thank you letter. If you then give donors a great deal of attention and respect, they will give you, or your successors, more money and other help.

Quite frankly, most organizations, whether conservative, liberal, charitable, or non-philosophical, do a poor job of thanking their donors.

Donors motivated by charitable impulses or by philosophical causes, seldom expect to get any personal return or benefit. They give money to improve society, to help their country, or just to assist people.

Donors feel put upon when people to whom they give money perpetually pester them for more money. Donors lose interest if an organization's entire communication with them is always the same: gimme, gimme, gimme.

Some friends of mine who head conservative organizations claim it's harder to raise money now than years ago. Maybe, but it's not true that there's less money being given for conservative causes.

I probably have as wide a view as anybody of what's going on across the country in conservative organizations. I can assure you there isn't a decline in the amount of money being given.

There are more people giving more money to conservative causes than ever. But they necessarily give to a smaller percentage of the growing number of organizations which solicit them. More groups

mean more competition.

Organizations fail financially if they do not persuade their donors they are doing a good job.

Consider all the party organizations and the focused-issue organizations like right to work, right to life, or right to keep and bear arms. Add in the traditional values groups, including the religious ministries which focus on conservative, traditional values. Billions of dollars are given each year to conservative causes.

There's money out there you can find. All you have to do is follow the systematic, step-by-step approach I've outlined for you.

You'll discover the amount of money you can raise is limited only by the amount of time you have to go out and persuasively ask.

There's an old saying in the insurance industry that the most successful insurance agent is not the one who sells to the highest percentage of people he asks, but the agent who persuasively asks the greatest number of good prospects to buy insurance.

So don't be distressed if you go to two or three people who do not give you money. Not everybody will.

But if you've developed a good list from the outset, by the time you've met with four or five potential donors, one of them will have given you both money and new names.

If you ever meet with failure after having followed the steps outlined above, please call, email, or write me at the Leadership Institute.

As I wrote at the start of this guide, no one who has followed this formula has ever told me it did not work.

# APPENDIX A:

## Sample campaign budget

This sample budget is for an ambitious state legislative campaign or an issue campaign for a similar geographic area. You may increase or decrease the exact dollar amounts for your own efforts.

<b>Voter Outreach</b>	<b>\$105,875</b>
Mailings (10 @ \$8,650/ea)	86,500
Telecom (VOIP phones for office)	8,875
Advertising	1,000
Digital Marketing (list-building)	9,500
<b>Field</b>	<b>\$7,250</b>
Campaign Events	3,500
Field Expenses	3,000
Other (volunteer meals, T-shirts)	750
<b>Collateral</b>	<b>\$11,590</b>
Signs	8,340
Literature	2,500
Other (stickers, palm cards)	750
<b>Digital</b>	<b>\$4,175</b>
Graphic Design	1,050
Website	650
Email Marketing	2,100
Transaction Fees (for donations)	375
<b>Admin</b>	<b>\$16,500</b>
Fundraising	0
Campaign Staff (part-time)	16,500
<u>Consultants</u>	<u>0</u>
<b>Total:</b>	<b>\$145,390</b>

# APPENDIX B:

## Sample speaker program budget

This sample budget is for a speaker program to bring three exciting speakers to a club or organization. You may increase or decrease the exact dollar amounts for your own efforts. If you have specific speakers in mind, research their honoraria and include them in the budget.

<b>Speakers</b>	<b>\$6,562</b>
Speaker honoraria (3 @ \$1,000/ea)	3,000
Speaker travel expenses	2,500
Speaker lodging (6 nights @ \$102/ea)	612
Speaker meals	450
<b>Event</b>	<b>\$4,475</b>
Venue rental (\$1,000/ea event)	3,000
Audio visual equipment rental	750
Event refreshments	600
Livestreaming equipment	125
<b>Promotion</b>	<b>\$1,150</b>
Flyers (design, printing)	250
Facebook ads	500
Email Marketing	400
<hr/>	
Total:	<b>\$12,187</b>

## ABOUT

# Morton C. Blackwell

Professionally, Morton Blackwell is the president of the Leadership Institute, a non-partisan educational foundation he founded in 1979.

In youth politics, Mr. Blackwell was a College Republican state chairman and a Young Republican state chairman in Louisiana.



He served on the Young Republican National Committee for more than a dozen years, rising to the position of Young Republican National Federation national vice chairman at large.

Off and on for five and a half years, 1965-1970, he worked as executive director of the College Republican National Committee under four consecutive College Republican national chairmen.

Having worked actively in politics for more than fifty years, he has probably trained more political activists than any other conservative. Starting in the 1960s, he has trained thousands of people who have served on staff for conservative candidates in every state.

Mr. Blackwell was Barry Goldwater's youngest elected delegate to the 1964 Republican National Convention in San Francisco.

He was a national convention Alternate Delegate for Ronald Reagan in 1968 and 1976, and a Ronald Reagan Delegate at the 1980 national convention.

In 1980, he organized and oversaw the national youth effort for Ronald Reagan.

He served as Special Assistant to the President on President Reagan's White House Staff 1981-1984.

First elected to the Arlington County (Virginia) Republican Committee in 1972, he is a member of the Virginia Republican state central committee and was first elected in 1988 as Virginia's Republican National Committeeman (RNC), a post he still holds.

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