
Maximising Major Gifts: The Art & Science

Asking

Ann Badger & Clare Pullar

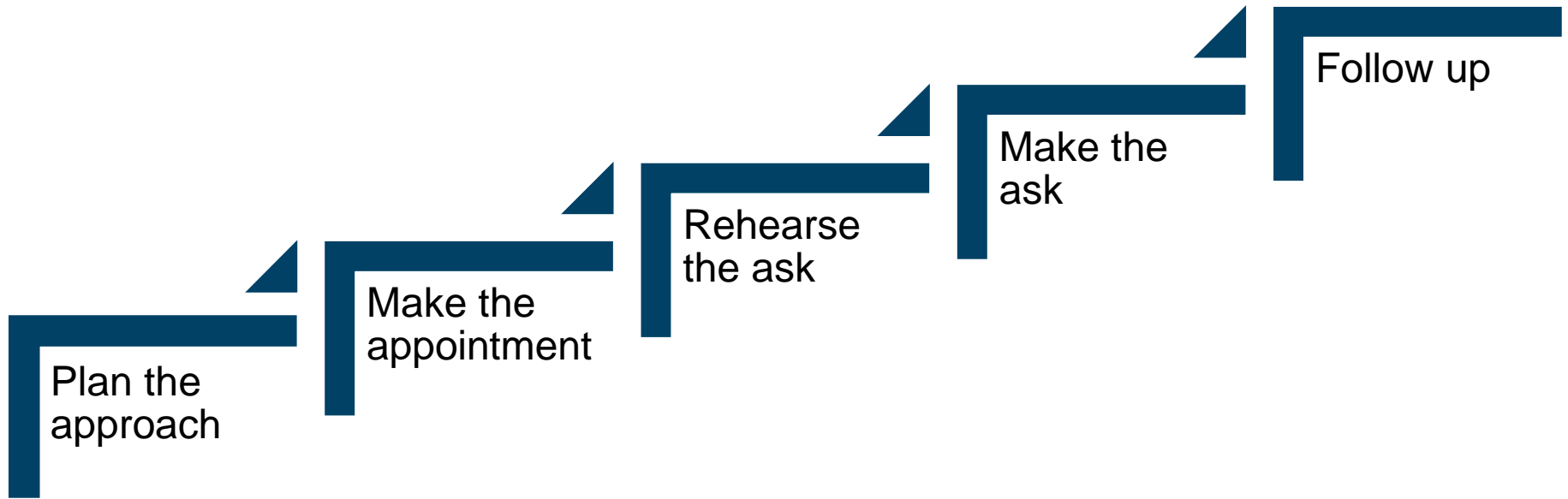
creative
partnerships
australia

The Key Elements

In putting together a thoughtful asking strategy, four elements are critical and need to be incorporated into your thinking:

- 1 Knowledge of the project (the CASE) and a demonstrated passion
- 2 Knowledge of the prospect
- 3 Established relationship
- 4 Identified contact person/asker and a plan to bring them closer to the project and ask

The Key Steps



Asking – the Approach

- Look for capacity meeting passion
- Create the opportunity to present ‘the ask’
- The final step in engagement: Gain permission to present a proposal (written, oral, etc.) for an ‘ask’

Asking...

- Prepare, plan
- Take the time
- Know your prospect
- Listen
- Look for the 'dream team' to ask for this person; could be: You & CEO; Artistic Director & You; You & Chair
- For many gifts: the advocate/volunteer & development

People give best to inspirational people committed to inspirational projects

Making the call



- Choose your best prospects first!
- Choose a quiet location before ringing
- Prepare dot points and have calendar(s) ready
- Brief intro/pleasantries
- Move on to the campaign/project/cause, its importance and coming to see them
- Ask to meet and discuss
- Offer two or three date options
- Let them choose with whom (e.g. partner) and where e.g. office, home, school (avoid clubs and very public places)

Securing a Face-to-Face Meeting

- This program is the largest X has undertaken in support of the future XX...please partner with us
- The future of XX really matters and I'd love to chat with you about this
- The printed material simply cannot convey the importance and excitement of this project and the scope of our plans. It's important to meet with you personally...
- You have been such a great friend of XX and such a strong advocate for XX ...that's why we are calling on you personally and giving you this opportunity to partner in this important initiative

Asking Meeting...Preparation

- Prepare, rehearse, practice, think about your timing (e.g. planning for a 30min appt)
- Where there are two of you, be clear on who does what
- Be well briefed e.g. understand re importance of pledges, potential naming opportunities, etc.
- Take supporting collateral, gift form, naming opportunity list, etc.
- Consider what inspirational language you might be able to use (imagine, transform, solve...)
- Have a real story that inspires
- Be prepared to show your passion and support
- Get there early!

The Asking Meeting

- General conversation: SHORT
- Thank them for their time and opportunity to meet
- Link to earlier conversations
- I'm here as the Director/Chair/a volunteer to chat with you re our project/campaign for a XX
- Emphasise that this is an amazing opportunity to show your support for XX and our future
- Briefly highlight the case for the XX
- Demonstrate its importance and the impact of philanthropic support

The Asking Meeting

- Highlight how much their gift would matter and show support for XX and this project
- Talk the importance of building high level support for the campaign/project/initiative
- Refer to how it would inspire the cast/orchestra/artists/etc.
- Probe & match (connect & explore)
- Feedback & affirmation
- Use aspirational language (imagine, transform, solve...)
- Work to turn potential objections into opportunities
- Watch and listen...e.g. special areas of interest, naming, family...



And now Ask

- Your investment of \$x would enable this transformational project of y...
- Peer: I am so committed to this wonderful X and the future of X that I have given X, would you join me?
- Here is an opportunity to make a transformational gift – would you join me and others in giving X?
- Would you consider a gift of X that would help fund Y part /room/program of this important project.
- A gift of \$X would enable ...

Some more ways to ask

- Would you consider a gift of \$x to \$y spread over three to five years...
- Your gift at X level would inspire others in our community
- A gift of X would make a huge difference to this new XX and give you membership of X at Y level
- Only a few of us can make gift at this level and take X forward – would you join me?



© 1988 United Feature Syndicate, Inc.



Reprinted with permission of UFS, Inc.

The Magic of Silence...

- Wait quietly
- Maintain eye contact
- The golden rule: let them (make them) speak next

YES: have a plan of action (thank you, gift agreement, stewardship, etc.)

MAYBE: explore & probe. Leave with a plan of action/next step

NO: Find out if it is really no by asking the second 'key' question and ensure they speak next. If it is really no, gently try to find out why

Asking...

What would need to change for you to feel able to participate and give???

Some Common Issues

- Timing: of gift/of ask
- Amount
- Project fit
- Personal issues
- Institutional issues
- ?

Yes or No...

- The outcome needs to become a clear **yes** or a clear **no**.
- It's important to accept **no** with the same graciousness as a **yes** and to thank them for the meeting as warmly, and to **build the relationship** through the meeting and what happens afterwards.
- How you accept **no** this time can help towards an eventual **yes** another time.

Closing the Gift...

- Summarise the conversation
- Acknowledge that they may need time to make a decision
- Thank the donor...more than once!
- End with specific follow-up steps
- If appropriate, ask them to be a volunteer or influence others or...

Closing the Gift...

- Negotiate & close the gift
- Say thank you
- Discuss gift agreement (amount, payment, recognition, etc.)
- Encourage the benefactor to make their gift public (inspire others...)
- Re state next steps & timing

An oral agreement during an asking meeting is only the first wonderful step in the process of accepting and stewarding a gift.

- You need to make it clear to the donor that we will be providing them with a formal gift agreement to sign that recognises their gift
- Remember – philanthropy today is an investment and needs to be respected as such.
- Both sides are making commitments and it is critical that these commitments be recorded in a formal gift agreement.
- No gift agreement; no gift

- Debrief, record as much detail as possible and assess next steps. The process continues whatever the outcome.
- If there is a gap of more than a week to next contact/meeting, send a thank you /confirming note or email
- Don't leave the pledge/gift form/paperwork if possible
- Follow up!

Celebrate & Steward!

Be mindful of and plan for excellent stewardship beyond the thank you and receipt. Stewardship is a contact sport!

Impact Reporting

Ethical

Donor centric

Sustainable

Bespoke

Built into standard operations

Content rich

Planned, resourced, tracked,
documented, evaluated



Ann – badger@martsandlundy.com
Clare – pullar@martsandlundy.com

Marts&Lundy