
Maximising Major Gifts: The Art & Science

The Discovery Visit

Ann Badger & Clare Pullar

creative
partnerships
australia

Getting a Qualification Meeting

An introductory letter to a selected list ...

- The organisation is implementing an new strategic plan that will raise its impact. The CEO has asked officers to reach out on his/her behalf to learn about friends thoughts about the plans.
- Introduce yourself as someone who wants to hear from them about their engagement with the organisation and their views concerning the organisation and its plans for the future.
- You would like an in-person visit. 30 minutes or so.
- Mention that you will follow up with a call to arrange a time.
- Include your email address.

Follow up after 3 – 5 days with a call to set a time and place



"WE RAN OUT OF THINGS TO TALK ABOUT
SO I ASKED HIM FOR MONEY."

Discovery visit ...

- Express your openness through engaged listening.
- Find common threads that tie your interests together.
- People generally like to talk about themselves and your job is to provide them with many openings.
- What is their own story and their relationship to the organisation.
- How does the organisations relate it to their life experience.
- The qualification visit is only partially focused on presenting organisation's story or the story of a specific area/program/initiative.
- They need to like you.

Conversation Starters 1

Express appreciation for taking the time to meet.

Ask open-ended questions concerning the prospect's involvement with the Institution in the past and in the present.

- If they attended a recent performance/exhibition/play/etc. seek their feedback on that.
- Ask about their favourite play/performance/music/art/etc.
- If they are donors:
 - Thank them for their past gift(s) to organisation.
 - What made them decide to give?
 - Was there a person who helped them make that decision?
 - Has their journey as a donor been a good one?
 - How could we better look after their interests as a donor?
 - Did their gift have the impact they wished for?

Conversation Starters 2

- Ask about career path and interests
- High points in their careers, congratulate them on successes. What comes next.
- What do they know about organisation now and future plans? Are they more connected to a specific area/part or the organisation at large? Whom have they met in Leadership?

Other

- Partner? Children? Ages, schools, universities. Parents? Profession or retired,
- Leisure ? How do they achieve work life balance? Activities? Holidays etc.
- Observe their house environment if you meet there

Closing 3

- Don't overstay – leave on time
- Thank the prospect for the time they have given to meet with you.
- Express your hope that this can be the beginning of an expanded relationship with the organisation.
- Give the prospect any relevant written material.
- Offer to organise a 'site' visit / attend a performance.

After the Visit...

- The qualification visit is only worth while if there is a follow-up plan.
- Write a thank-you note
- Did you get sufficient information from the visit to determine whether the prospect has major gift capacity?
- Are they favorably disposed?
- What do they know about the CEO/Exec Director?
- Does their personal situation allow for major gift cultivation?
- Do they have any history of philanthropy?

Discovery – and asking for an Annual Gift

- Asking for an annual gift can be an important cultivation activity.
- If they have major gift potential, use the annual ask as an invitation to come closer to your organisation.
- Let them know that annual philanthropic support is critical to the organisation.
- Annual gifts represent engagement and can be a very important first step on the road to a major gift.
- If you believe that they do not have major gift potential, ask them for an annual gift anyway.

More Next Steps

If the answer is “yes” then they are now a qualified major gift prospect and ready to begin cultivation.

What is the plan?

- A visit to the organisation or to an invitation to an event?
- Another visit from you?
- A visit from a key person e.g. lead, artistic director, conductor...
- A visit from a key volunteer?
- Write up report and next steps in database?
- Report on visits at PM meetings

Common Errors: Your experience?

- Lack of preparation and knowledge of who you are speaking with.
- Not pushing for an in-person visit.
- Not having a follow-up plan.
- Apologising for bothering them.
- Talking too much and not listening enough.
- Not asking the prospect about their family and their business.
- Interrupting or judging when objections are expressed.
- Asking for a gift too soon or inappropriately.
- Talking objections to mean “no.” Be patient and interpret “no” to mean “not yet.”
- Not thanking the prospect for his/her time.
- Not writing a thank you note immediately.
- Not recording the results of the meeting within the system.

Engagement of High Probability Prospects

- Running calendar of consultations for the top group of donors/prospects about the future of the organisation
- Sustainable program occurring every 8 -10 weeks when established
- 90 minute sessions (breakfast, lunch, after-work drinks) hosted in the organisation or at Volunteer's office or home
- 8 – 14 people at a time – usually a mix + CEO + CAO

Engagement of High Probability Prospects

- 6-8 week process:
 - Letter of invitation signed by CEO
 - Phone call to confirm details
 - Stimulus paper (like a Case for Support without the ask) sent a week out
 - Thank you letter and follow-up
- Introduction by CEO 15 minutes and then **one** conversation around a challenge, opportunity flagged in the stimulus paper/thought piece
- Follow-up

Five minute activity & share

- 1 Identify a person key to your organisation who could potentially be a major donor
- 2 Now prepare an engagement plan with three or four steps to begin to move this person towards a major gift and a successful ask



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

Marts&Lundy