



Opening chit-chat	5-10 minutes
Donor Engagement Tool: Continue building the relationship; Ask questions; listen for issues... e.g.: "What do you know about our org. and its current goals?" (dialogue)	20-30 minutes
Have the donor tell you what about the campaign or which initiative is most important to him/her. Still a dialogue!	
Permission to proceed to funding: Based on the plan we have been discussing, can we talk about how you can help?	10 seconds
Talk about funding options/benefits/recognition	3-5 minutes
Make the ask (and remain quiet until the donor responds)	30 seconds
Unless "yes," explore further (Technique: Program/Amount/Timing)	5-10 minutes
Agree on the step—ideally a return visit; alternatively, a scheduled phone call.	2-3 minutes
Ask who else might be interested in the initiative (If the donor is thinking about his/her gift, wait until the follow-up visit/call)	2-3 minutes

TOTAL VISIT: Approximately 45 minutes (but allow for up to 2 hours – you never know!)
FINAL STEP: Report back. (Jot down notes while the visit is fresh in your mind.)

Making the “ask”

Major gift solicitation language is very precise. It uses knowledge about how the brain processes language to achieve the best result.

Here’s the “ask”:

Version 1: So John, would you to consider a gift of \$xx,000 to support <nonprofit or the ABC campaign>*?

Version 2 (multi-year): So John, would you consider a gift of \$xx,000 per year for three years for a total of \$yy,000 to support < nonprofit or the ABC campaign>*?

[annual amount, number of years, add it up]

***Restricted gift:** If it has become clear during the course of the conversation that the donor wants to support a specific initiative or aspect of the campaign/program, then it’s: to support <restricted item>

Once you make the “ask”:



Remain silent until the prospect says something.

Why remain silent?

- Speak and you will be negotiating against yourself! You have put a proposal on the table. Let the prospect answer you.
- Speak and you will be distracting the prospect—give the person space to consider your request.
- Speak and you forgo an opportunity to observe the prospect’s core reaction.

Setting up the Donor Visit

Counter-intuitively, setting up the visit may be the most challenging part of the major gift process. Once a visit is scheduled, you're well down the road to a gift.

Goal of the call:

The goal of the call (or email) is to set-up the visit. That's it. Keep it short and sweet. You do NOT want to:

- Have the meeting over the phone
- Make the "ask" over the phone
- Agree to mail anything



Call vs. email: Try the phone first. If you get voice mail, leave a message with your name, the nonprofit and the fact that you are looking for their advice about an upcoming project. Let the prospect know that you will send a follow-up email. If you don't have an email, let them know you will try again the next day at x:00 o'clock or to feel free to contact you at <your number>. Try two or three times, and then wait 3-4 weeks and try again.

Basic technique:

- Opening chit-chat
- As someone who is a supporter/community leader/alumni/parent..., I'd like to get together to update you on an exciting project/program/initiative and see what you think. If it does interest you, you will have an opportunity to support it, if you would like to.
- Offer two dates and times—and mention that you are happy to meet at the donor's home or office—or wherever will be most convenient. (If you usually visit with this person over a meal or drinks, then offer that—but pick a quiet place.)

Sample language: Hi Steve, (a bit of small talk, then...) You know how much I value <nonprofit>. As a <leader/parent/alumni/volunteer/supporter> yourself, I'd like to talk with you about the exciting project we're working on and get your thoughts. Given your interest in <donor's interest area>, I think you'll find it important. There will be opportunities to support the initiative, if you'd like to. Can we get together next Tuesday, the 15th at 4:00 or Wednesday the 16th at 10:00? I can come to your home or office—or wherever would be convenient.

If you don't get an immediate "sure, let's get together," continue to focus on wanted the donor's advice.

Objection 1: Are you going to ask me for money? <Variation: I can't contribute more than I'm doing now.>

Note: Per the below, you are not going to answer this question with a "yes" or a "no." Either one will put you in an awkward position.

What I'm looking for is the opportunity to visit with you in person and see what you think.

The choice to be involved is entirely yours – YOU will decide if it is something you want to support.... Either way, you'll know what we're working on and we'll have your perspective on it. Is there a time next week, maybe on Tuesday or Wednesday, when we might have a brief meeting to share some information for you to consider?

Objection 2: Just tell me how much you want. Let's do this over the phone.

I just don't feel comfortable trying to explain the breadth of this project on the phone. I'm talking 30 minutes. Can you give me that much time? Will you do that? [get agreement to meet] What might be better for you – Tues or Wed, or some other time? We could get through the business and then go to lunch.

Objection 3: Send me all of the information. I will send a check.

Thank you for the offer a check—and knowing you as I do I know you would put one in the mail, but materials simply can't convey the importance and excitement about what we're working on. And we very much value your perspective. I know how busy you are, but all I'm asking for is 30 minutes. [get agreement to meet]. When could I come see you? Next Tuesday or Wednesday—or when?

Objection 4: Tell me what this is about.

Option 1: If the project has not been publicized/likely that the donor has no idea: *It's a great project, Steve. The truth is, I couldn't do it justice over the phone... I think you will find this important and we'd love to hear what you think. When might be a good time to meet you next week, Tuesday or Wednesday—or when?*

Option 2: Likely the donor knows about the project/something that has been discussed for a long time: *You know how we've been talking about <the need for a new xxxxx for a long time>. Well, we're working on it and we'd love to get your perspective. When might be a good time to meet you next week, Tuesday or Wednesday—or when?*

Objection 5: I'm so busy.

I know how busy you are, Steve. That's one of the reasons we'd love your perspective. You're the kind of person who gets things done. When I agreed to take this on, I promised I'd call on the people I thought would care about this type of project. And you're one of the key people I feel I really I must talk with. Would you take time for a brief meeting – coffee, cocktails, breakfast, whatever – (etc.) [get agreement to meet]

Post-ask: What to do when you don't get a "yes" right away (and usually, you won't)

You've made the ask: So, Steve, would you consider a gift of \$xx,000 to support <project name>. And you then *remained silent* until the prospect responded.

Likely, you did not receive a flat out "yes". (If you do get a "yes" or a specific amount offered, e.g., I won't give \$25,000 but I will give you \$10,000, then you respond with a big "thank you." You will have a Gift Form (for gifts being made within 30 days) and a Pledge Form (for multi-year gifts or gifts beyond 30 days). Pull out the appropriate form and complete it with the donor. The form includes how the donor would like to make the gift: check, credit card or stock.

Goal: Try to figure out the real reason the prospect is hesitating

Is it the particular program/project/campaign?

1. Is it the program/project/campaign
2. Is it the amount?
3. Is it the timing?

Language: It's completely understandable that you want to think about it. It would be helpful to be sure we're clear about what's on your mind.

Program/project/campaign question: During our conversation, it seemed like <program, campaign, initiative> is important to you—is that right?

Amount question: I suggested that you might want to consider a gift of \$xx,000. Am I correct that this the type of impact you want to have --and that you are thinking about how to make that work?

Timing question: [only go to this question if you don't already have clarity – or if the prospect has mentioned something about timing] I want to be sure the timing is not an issue. If you had additional time to complete your payments, would that enable you to make the gift you'd like to make?



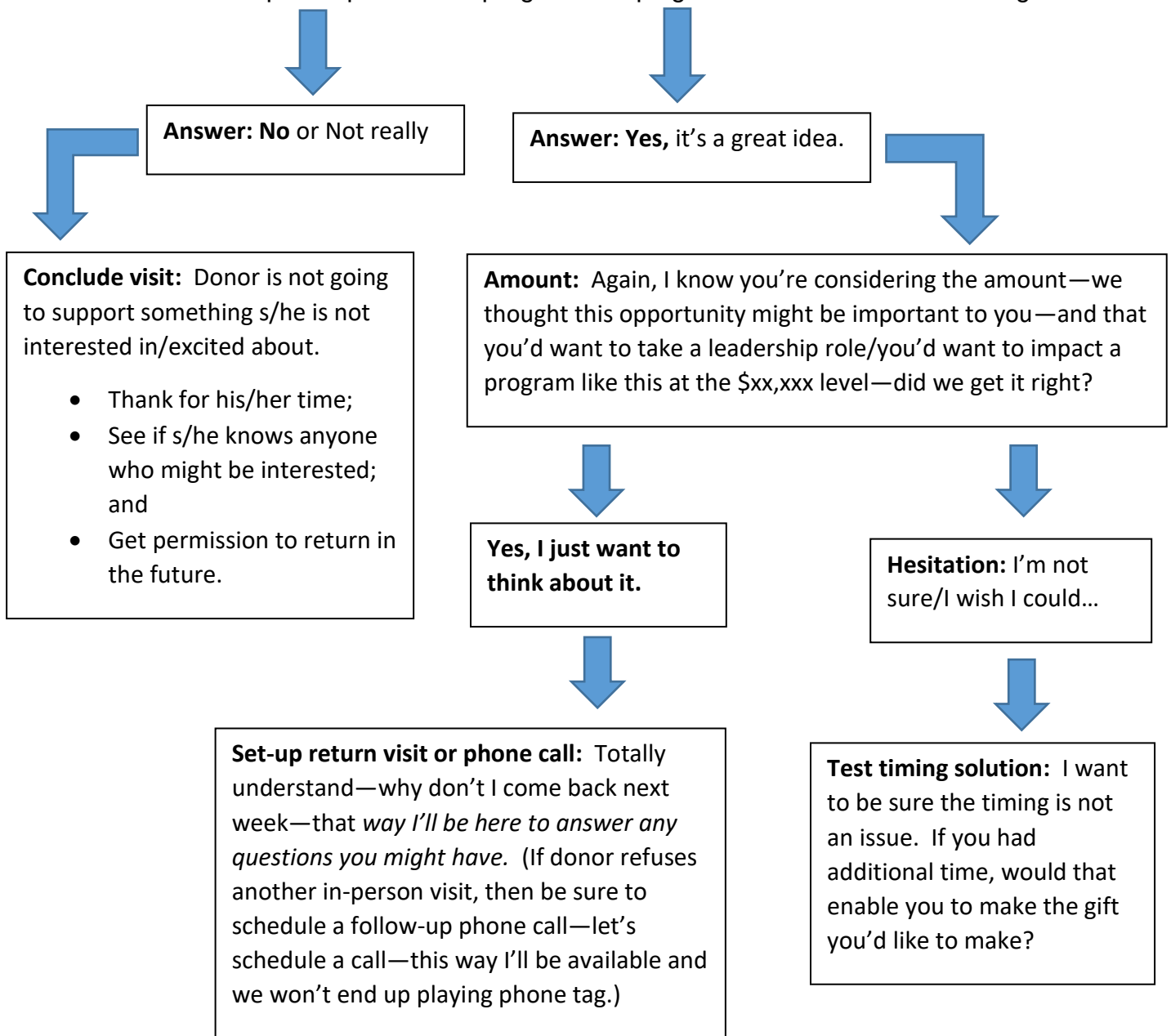
Memory tip for the order: Program, Amount, Timing

P.A.T yourself on the back!

Program, Amount, Timing (P.A.T.) in action--Amount

Donor: I have to think about it

Reply: I understand you want to think about it, Steve. Just to be sure I'm clear about where we are... you do, in fact, think it's important that <nonprofit> pursue this program/campaign/initiative? Do I have that right?



Program, Amount, Timing (P.A.T.) in action--Timing

Donor: My daughter is getting married in June; I'm currently fulfilling a big pledge; I have two kids in college.

Reply (start with Program): Respond appropriately, e.g., Congratulations, Steve—a daughter's wedding is very special. Just to be sure I'm clear about where we are... you do, in fact, think it's important that <nonprofit> pursue this program/campaign/initiative? Do I have that right?

Answer: No or Not really

Conclude visit: Donor is not going to support something s/he is not interested in/excited about.

- Thank for his/her time;
- See if s/he knows anyone who might be interested; and
- Get permission to return in the future.

Answer: Yes, it's a great idea.

Test timing solution: I understand <the situation>, and I want you to be able you to make the gift you'd like to make. Let's see if we can time this in a way that works for you.

- For a specific, upcoming event, e.g., a wedding: Offer to start the gift approximately 6 months post-event.
- issue, e.g., kids in college: Offer to spread the gift over multi-years; determine the amount that will work for the next 5 years (see negotiation); put the gift start date out in time; or, if necessary, stay in-touch and come back to giving at a better time.

Be certain to record notes at the conclusion of all donor visits and forward them to the designated staff member at your organization.

Scenario: I need to talk to my spouse/partner

Goal: Understand the relationship—is the spouse/partner going to weigh-in behind the scenes or does s/he need to be actively involved?

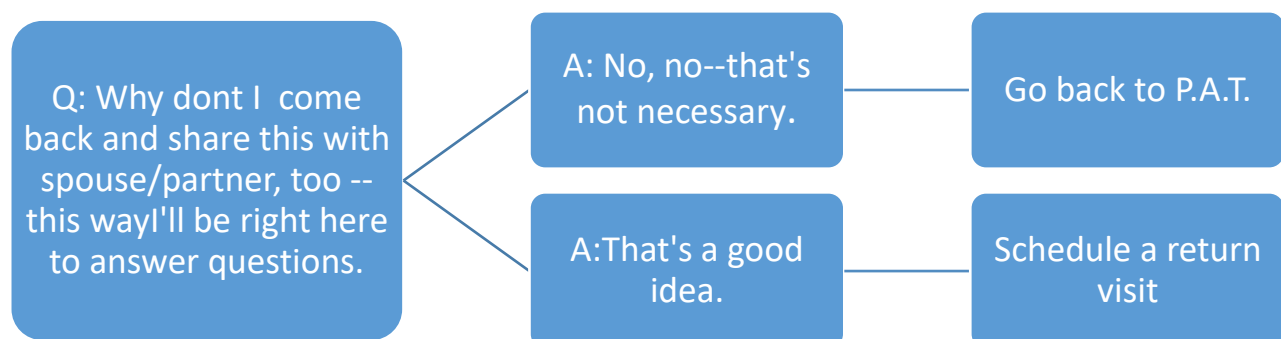
Here's how to find out:

Donor: I need to discuss this with Susan (his wife).

Solicitor: I understand that you want to talk with Susan. Why don't we do this: ***I'll come back on <propose next week at the same time> and walk the two of you through the campaign/initiative/program—this way, I'll be right here to answer any questions you or Steve might have.***

You are very likely to receive one of two answers:

- 1) No, no, no – that's not necessary. I can explain it to Susan. I'll let you know what we decide. [You still want to run though P.A.T. and schedule the next step—be it another visit or a phone call.]
- 2) Yes, that's a good idea. [schedule visit]



Scenario: Donor does not like to pledge

Ask for double the *yearly pledge amount* as a single gift—and get permission to return the next year.



Beware Negotiating the Amount

Resist the temptation to negotiate. ***Likely, the donor simply needs time to think about the amount.*** S/he is just hearing it for the first time.

Only negotiate if you hear a flat-out: "there is no way in the world I/we can do that" or "I/we can't possibly afford that much." You are listening for an ***absolute "no"*** that will be expressed through the words, voice tone and body language.

The following are **not negotiating triggers**:

- ✗ "Wow, that's a lot of money." [An observation, not a definitive statement that the donor can't or won't make the gift. Respond with an "impact statement," e.g., "With that gift, you will be xxxxxxxxxxxxxxxx."]
- ✗ "I wasn't expecting that." [Surprise is not a definitive "no." Donors are often surprised. The Program, Amount, Timing technique keeps the focus on the project and helps the donor determine how involved s/he wants to be in this opportunity.]
- ✗ "How did you come up with that number?" [Respond with impact, not process: "We know how much you care about xxxxxxxxxxxxx, in particular, and thought you would want to take a leadership role/this would be level at which you would want to be involved."]

Tip: What is or is not "a lot of money" is in the eye (and financial circumstances) of the beholder.

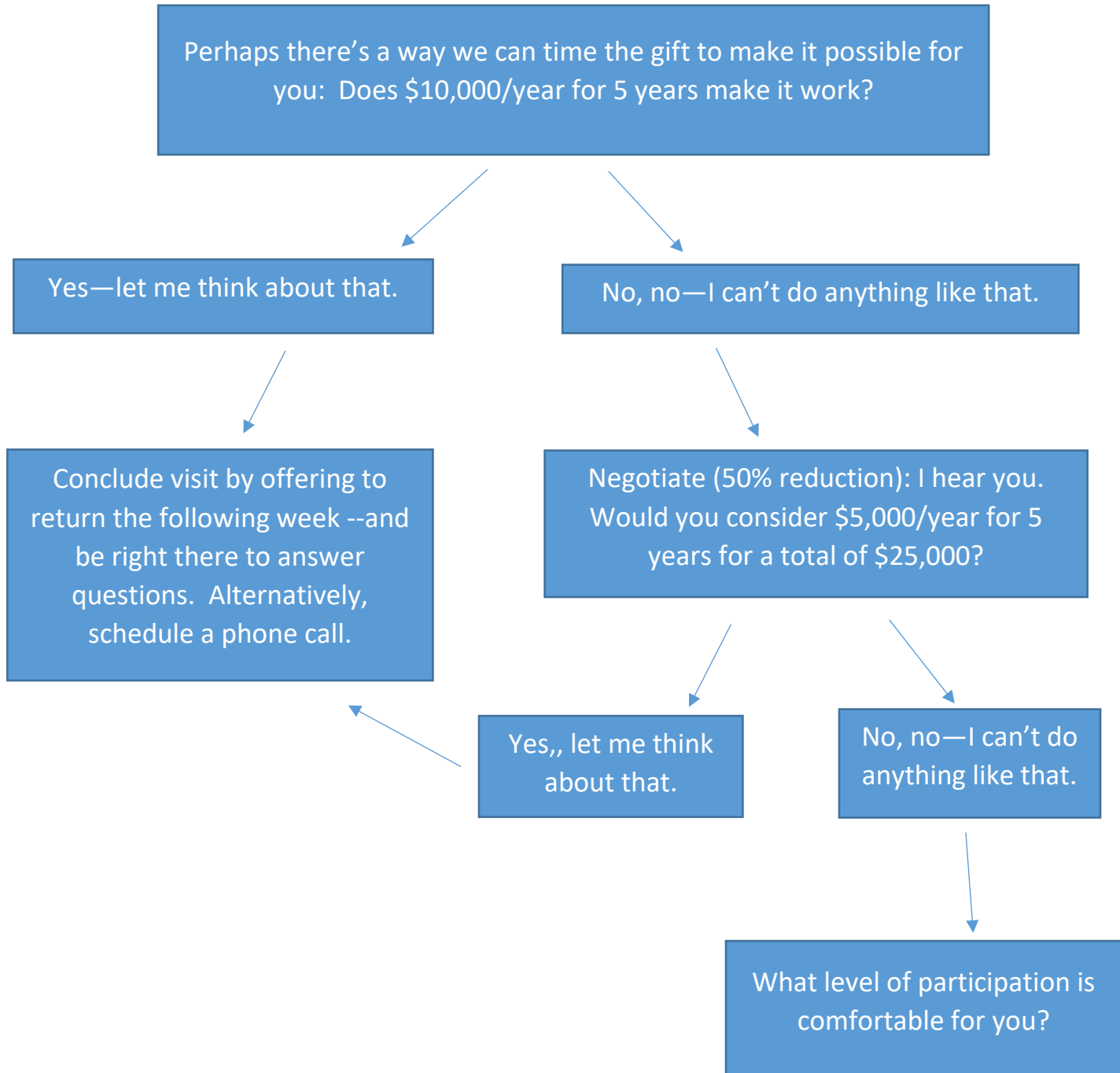
If the donor makes a subjective comment about the amount, then make an impact-related reply. Otherwise, you are adding your personal values about money into the mix. "Yes, that is a lot of money" may seem empathetic, but it also a judgement that may actually make the donor feel awkward about giving at that level. Stick with: "It puts you in a leadership role on this initiative—which seems to be the type of impact you want to have" or "You will be making a big difference."

Negotiation steps: If you do receive a flat-out "no" and want to negotiate:

1. If you asked for the gift as a lump-sum, e.g., for an outright \$50,000, test a timing solution: "Would you be able to fund this project the way you'd like to if we spread your gift over time—would \$10,000 a year for 5 years for a total of \$50,000 make it possible?"

2. If timing doesn't get you to "yes," then negotiate the amount. Reduce the amount by 50% and re-ask using the "ask" format: "So John, would you consider a gift of \$25,000 to support this project?"
3. If you are still at a definitive "no," then ask the donor at what level s/he would like to participate.

Scenario: You asked for \$50,000 and the donor replied: As much as I might want to, there is absolutely no way I can do that.



Resources

Asking

- *Asking*, Jerold Panas, Emerson & Church Publishers, 2008.
- *Asking Styles*, Andrea Kihlstedt, CharityChannel Press, 2012.
- *Donor-Centered Fundraising*, Penelope Burk, © 2003. *Donor-Centered Fundraising* is a Registered Trademark of Cygnus Applied Research, Inc.
- For Impact/The Suddes Group www.forimpact.org [Donor Engagement Tool and lots of other great info]
- *The Fundraiser's Guide to Irresistible Communications*, Jeff Brooks, Emerson & Church Publishers, 2012.
- Veritus Group. www.veritusgroup.com [Tiering your major donors and lots of other great info]

Prospect Research Resources

- APRA - Association of Professional Researchers www.aprahome.org
- Jennifer Filla, President | Aspire Research Group LLC, CEO | Prospect Research Institute LLC jen@aspireresearchgroup.com | (727) 202 3405 x700 (also runs Small Shop Research training)
- Tools: Blackbaud Analytics, DonorSearch, iWave, WealthEngine