

Asking for a Major Gift: How to Practice & Prepare

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2019 Petrus Leadership
Conference
June 23-26 | Oklahoma City, OK

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Qualification is the donor's capacity to make a gift

Invest in Donor Qualification

You never propose marriage on the first date



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The most Qualified Donor is connected at 3 levels

In development we often refer to this as the LAI Principle

Linkage

Ability

Interest



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As stated in “Opening the Door to Major Gifts” by John Greenhoe –

“...the Association of Fundraising Professionals (AFP) conducted a 2011 survey in which respondents indicated **“making a call to a prospective donor” (ID/qualification) was even more stressful than “making an ask” (face-to-face solicitation)...**



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Always start with current donors

Use other people to connect

Set the stage with a letter or email

Don't assume they don't want to talk to you



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In the book “Opening the Door to Major Gifts” by John Greenhoe, he suggests using the **OARS** method **O**ne hour each day, **a**t least 7 calls per valid prospect, **r**ecycle your prospects, **S**ee them/cross them off)—on average one solid call every five minutes, or 12 per hour, even if none are reached directly.

“I recommend making at least 7 telephone calls to a potential prospect before crossing someone off your list or marking that person for follow-up at a later time. Why 7? The number might seem arbitrary, but practice has told me that 7 is a good number. Further, in the marketing profession, it is generally thought that it takes at least 7 phone calls to reach the average “C-level” executive (CEO, CFO, CIO, etc.). Recently a development colleague told me he finally reached a prospect with his 7th phone call. The prospect congratulated my colleague during the call, telling him, “If I don’t know you, you are going to need to make at least seven (phone) calls for me to respond.”



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Create a Script when someone answers

Create a script for a voicemail

Follow the Bes

- Be prepared
 - Be clear
- Be Concise
- Be compelling
- Be welcoming
- Be reachable
- Be persistent



What's the worst thing that could happen? – Get used to the worse-case scenario

- Won't take the call to begin with, or even hangs up on you!
- Won't want to share information but takes your call.
- Shares information but has absolutely no interest in your ministry.
- Takes call, shares information, interested in ministry, but does not have capacity.
- Things outside of your control: Church scandals, tax laws, "organized religion," same-sex marriage



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- Prepare for the meeting- understand your objectives
 - Prepare appropriate materials
 - Location, ask but be prepared for a place
 - Assume you will pick up the tab
 - Be early
- Assume unless already pre-determined that it will last 30 minutes
 - Be prepared for it to last longer
 - Give a follow up timeframe
 - Never leave money on the table



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The Anatomy of the Meeting

General Greeting

Small Talk

Introduction to ministry or information sharing

Probing questions for constituent

Ask proposal- remember to use words like “prayerfully consider”, “join with us”, and BE SILENT

If no, “is there a gift range that you would be more comfortable with”, “another project”

If unsure, set a definite follow up date and plan

If yes, then arrange for gift exchange

Always ask if there is anyone else they should speak to about the ministry?



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Scenario #1

- Mary Smith, age 64, windowed with grown children
- Retired from Lots of Money Investments 3 years ago
- Regular volunteer at CM events
- Is a monthly donor at \$250.00 (through electronic recurring gift)
- You know her informally from events but never have “talked” contributions



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Scenario #2

- Bob & Judy, mid 70's, retired professional careers
- Are alums of University and their children were involved with CM
- No current volunteer connections to CM
- Make an annual \$10,000.00 gift through Direct Mail



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Scenario # 3

- John & Kaitlin, early 30's, no children yet
- Recent law school grad and a nurse practitioner
- Served in student leadership positions of CM
- Give sporadically at the \$75-250.00 level through mail and events



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- Best practice would be to take notes or make a voice recording of the visit the day the visit occurs
- Note: relationship to organization, attitude towards organization, financial capacity, interest in project, gift ask
- Send a personal thank you note within 5 days of the meeting
- Be prepared to offer another meeting
- Thank again, call again



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“As Catholics, we are all called to attend to the larger mission of the church. At a time when Catholic institutions are still reeling from a loss of priests and religious, who have done so much to ensure the financial and spiritual stability of their organizations, it is essential that a new generation of Catholics find effective ways to spread the resources of the faithful. As the pope reminds us, we are called to administer the goods we possess, which are not “our exclusive possession.” Ultimately, development is about hope and trust in God’s providence, not for the sake of raising money or meeting income goals, but for the sake of the church’s myriad apostolates. May we all find ways to contribute to their future success.”

Kerry Alys Robinson, *Imagining Abundance*



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THANK YOU!

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