

Cultivating Donors: Major Gift Success

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Our Tagline:

Your Aspirations, Funded

www.HellerFundraisingGroup.com

Heller Fundraising Group: *Our Expertise*

- Feasibility and/or Planning Studies
- Capital Campaigns
- Major Gift Programs
- Training/Coaching on Major Gift solicitation



Heller Fundraising Group: *Our Clients*



Partial list of HFG Clients. Full list available on our website.

Heller Fundraising Group: *Our Team*





Are you NOW
or have you ever been
SCARED
to ask for a big gift

Asking is Scary

Procrastinating is Easier

Even though it's scary....
make room for **Major Gifts**

2017: Americans gave **\$410B**

Corporations: 5%

Foundations: 16%

Individuals: 79%

What does
cultivating the donors
mean

Focus on the relationship,
not the money.

Imagine the donor's
point of view

Your job is to earn the
donor's trust

The 7-38-55 Rule

How we communicate

words: 7%

tone of voice: 38%

body language: 55%



How do you see your donor:
opponent or partner?

“We’re in this together.
We play different roles,
but our goals are the same.”

Imagine the donor's point
of view *when being asked*

Asking **is** cultivation, **too**.

Steps for asking for a major gift

1. Get Organized

2. Schedule Your Meetings

3. Meet and Ask for the Gift!

STEP 1: Get Organized

- Tell your organization's story
- Define your major gift amount
- Create a Prospect List
- Decide how many meetings/month you can do
- Create a Meeting Log

Tell Your Story

- Your mission
- Your vision
- Why you exist
- Your programs
- Your history
- Your accomplishments
- Your goals
- The cost of your goals

Imagine the donor's point
of view *about your story*

Define your Major Gift Amount: minimum you hope to get via a mtg

- Tracking – to report the past and predict the future
- Donor Recognition – who gets it
- Time management

How BIG is Major? *It depends...*

- On your organization and its giving history
- On your donor/prospective donor list

Create a Prospect List

Top Prospect List						
Next Step Date	Last Name	First Name	Connection	Next Step	Target \$ Ask	Notes/Comments
12/15/2018			Friend of Mrs. X	call Mrs. X re strategy	\$ 10,000	underwrite lecture
12/19/2018			Donor	annual appeal letter	\$ 25,000	cultivate for board committee
1/10/2019			Foundation	staff discussion	\$ 10,000	new program support
1/12/2019			Potential Donor	invite to our event	\$ 50,000	endowment prospect
1/16/2019			Board Member	call Board Chair to discuss	\$ 100,000	potential major donor
1/20/2019			Local Business	send letter of introduction	\$ 10,000	cultivate for board
1/30/2019			Longtime Major Donor	invite for lunch	\$ 50,000	thank her/tell her about our plans for 2019



Develop a Strategy *for each major donor:*

- Review: giving history/involvement with your org
- Analyze: which of your programs will inspire
- Analyze: how strong is the relationship
- Figure out: the best “ask”: \$\$, connection, advice?
- Decide: who is best qualified to meet with donor –
no more than two people from your org

Setting Your Monthly Meeting Goal:

What's required for a meeting?

1. Research the donor for connections, giving history
2. Strategize with your team to determine the “ask”
3. Schedule the meeting
4. Prepare the script for the meeting
5. Practice: in the mirror, with your partner
6. **THE MEETING**
7. Send a thank-you email or note to donor & partner
8. Follow up any actionable steps discussed
9. Record the meeting

Create a Meeting Log

LOG OF DONOR MEETINGS, 2018

MEETINGS IN JANUARY, 2018

DATE	NAME	MEETING PARTICIPANTS	MEETING TYPE	GIFT	NOTES
1/10	Mrs. Gottbucks	Mrs. Gottbucks, ED, DoD	Cultivation		She would like us to meet with her husband later this month
1/12	Phil N. Thropy	Mr. Thropy, DoD	Solicitation	\$100,000	Would like to discuss his will
1/15	Mr. Board Member	Board Member, DoD	Cultivation	\$15,000	With this gift, we now have 100% board participation
1/19	Rich Realtors	Mr. Rich, DoD	Solicitation		Rich Realtors has a foundation; Mr. Rich will connect us to VP in charge
1/22	Bullwinkle A. Moose	Mr. & Mrs. Moose, Board Chair, ED	Cultivation	\$0	Not ready to commit. Willing to introduce us to Boris and Natasha
1/27	Homer Simpson	Homer, ED, DoD	Solicitation		Will discuss with Marge
1/31	Mr. & Mrs. Gottbucks	The Gottbucks, ED, DoD	Cultivation	\$500,000	Gift is being processed

STEP 2: Schedule Your Meeting

- Your goal is a Face-to-Face meeting
- Use phone or email to schedule – no texting, for now
- Write a letter ONLY if no other option
- Write a phone script for yourself
- Leave a message if a machine answers
- Practice mock phone calls with a colleague
- Don't call when you're not in the right mood
- Always follow the rules for phone calls or email

Rules for Phone Calls

- State who you are and identify your org
- Ask how they are – make it personal
- Ask if it's a good time for a short chat
- State the purpose of your call
- Ask for a meeting
- DO NOT HAVE THE MEETING ON THE PHONE
- Confirm the date/time – OR – *handle objections*

If they say NO....

thank them for their candor...

*be grateful you didn't waste your time meeting
with them, and move on*

Rules for Email



Are you sending emails to avoid the phone?

Rules for Email

- Pick a clear, short and personal SUBJECT line
- Keep content short, with only one subject: your meeting
- *If you know the person:* Start with a friendly phrase
- *If you don't know him/her:* Start by connecting-the-dots
- Jump right into your purpose: “I hope we can meet to...”
- Make it as easy as possible to say “yes”
- End with thanks, a promise to reach out again, and a way to reach you

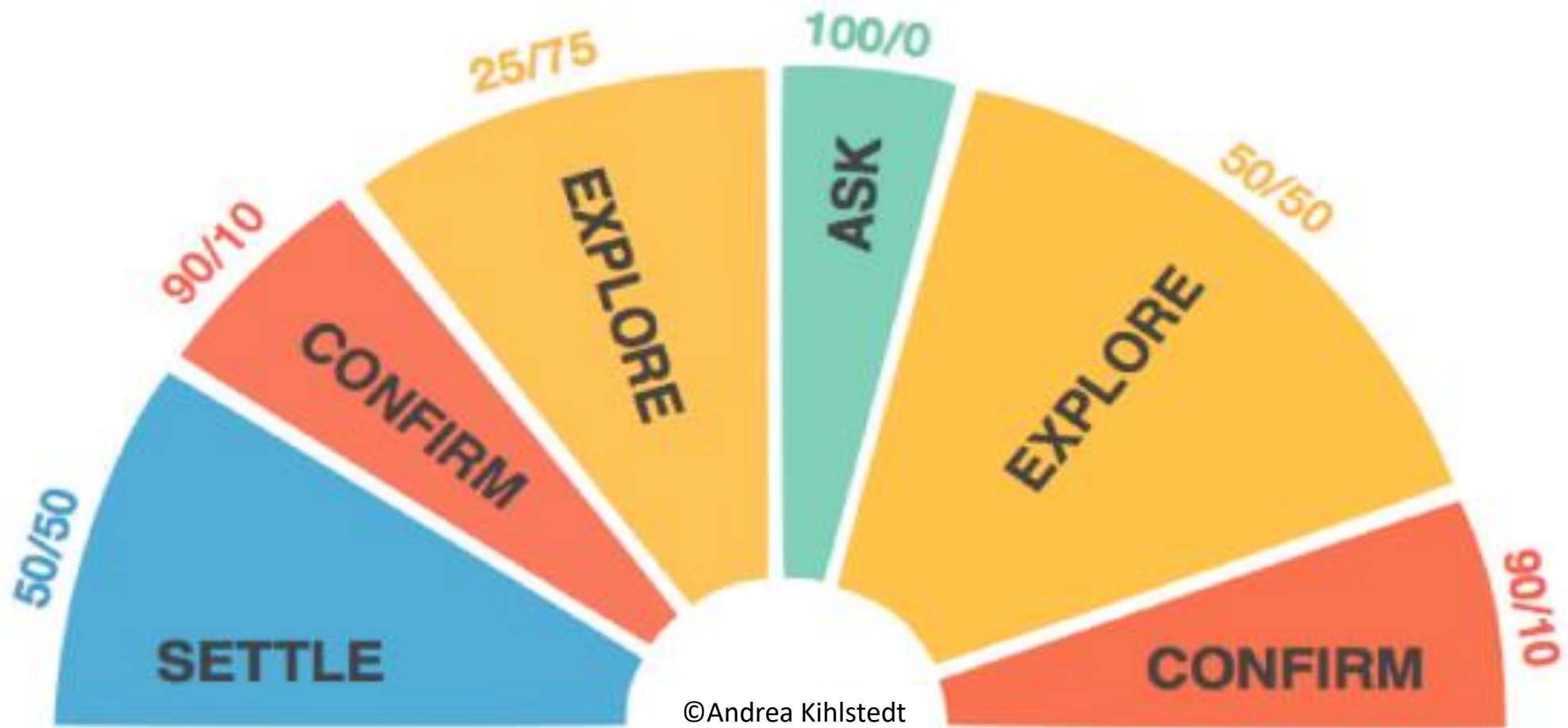
STEP 3:
Meet and ASK!

Rules for Meetings

- Always listen closely for valuable info
- Always be sincere and open
- Ask “how/why” questions that require more than Yes/No
- No matter what, **MAKE AN ASK**
- **Always “shut up” after asking**
- Always state your agreements and next steps out loud
- Always follow up **THAT DAY** with thank-you note or email

The Arc of the Ask

ROLES at a MEETING: Solicitor %/Prospective Donor %



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Language for asking

- “We were hoping you’d consider a gift of \$25K.”
- “We’re so grateful for your annual gift! Would you consider increasing it, maybe even doubling it?”
- “Honestly, I have NO idea how much to ask you for, but I know what we need. Is \$25K something you could consider?”

What to do if they say NO...



Instead of freaking out....

- Explore their reasons; something they don't like?
- Be open to their feedback
- Be non-defensive so they feel safe being candid
- Listen carefully to understand their reasoning
- Sincerely thank them for spending time with you
- Send a thank you note or email, *just as you would if they said yes*

Handling “no....”

- *Do not take it personally...it's not about you*
- If they took the meeting with you, they were/are interested in your cause
- Just because they said “no”, the relationship is not over
- You may never know the full story behind their “No”
- Your job is to ASK....you cannot control the outcome
- Give yourself some breathing time before the next task

A Final Thought About Cultivation:
Show the Donor she's not an ATM

DON'T send your
annual appeal letter to
Major Donors and Prospects



Reasons to Connect WITHOUT Asking

- Updates about your work
- Holiday/birthday/anniversary, family milestones
- Acknowledge anniversary of her first/best gift
- Check in after bad weather
- Introduce her to people she might like to know
- Send articles about issues/causes other than yours that interest her

Get your DONOR
to see YOU
as a fellow traveler

Major Gifts: They Can Be Yours!

Our Free Tools

www.HellerFundraisingGroup.com

- Top Prospect Report
- “Tell Your Story” Worksheet
- And more!



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Thanks for listening!

QUESTIONS?



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