

## 13 Tips on Asking for a Major Gift + Sample Script

“Fundraising isn't a simple process of begging - it's a process of transferring the importance of the project to the donor.”

- Hank Rosso, Founder, The Fundraising School

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# 13 Tips on Asking for a Major Gift

## 1. Fundraising is not an end in itself; it's how goals are met.

**You offer the opportunity for people to satisfy their personal desire to enact their values.** You offer an inspiring *investment* with a positive social return. Stop thinking of fundraising as a 'necessary evil'; reframe it as a 'way to change lives.'

### Don't say

- *Every little bit helps.*
- *You probably hate to get this call, but...*
- *I know this is a bad time, and the economy is bad, but...*
- *It's time for me to hit you up (twist your arm) for a donation.*

### Do say

- *I know you've been a strong supporter.*
- *I know you share my values about...*
- *I hope you'll invest with me for a positive social return.*
- *I'm curious... what inspires you to be involved here?*

## 2. Philanthropy is a “pay it forward” proposition.

**It's about the future.** It's about assuring your ability to be here for everyone in the community who relies on you. It's about doing what needs to be done to move your mission forward.

**Remember you are not asking for yourself** – or for the budgetary needs of your organization. You are asking to help improve and save lives... give hope... inspire... soothe.... teach.... create more caring in our community. We have a great thing to sell: the solutions which our organization provides to community and personal problems. We are selling the opportunity for people to satisfy their own desire to help solve social problems in the world. Importantly, we are talking with people who have already shown that they care about helping people and supporting us.

### 3. A gift to your organization is really a gift *through* your organization to accomplish a valued outcome.

**People don't give to institutions.** They give to institutions that deliver on the promise to enact a value they believe is important (e.g., fighting child hunger, improving school nutrition, feeding at-risk seniors, delivering healthy food to all in need; sustaining the arts; furthering social justice; repairing the environment).

#### Remind them

- This is a cause they can connect with/that matches their values.
- This is an organization with strong, vibrant programs upon which the community relies.
- This is a trusted, effective, well-managed organization.
- This is an opportunity to *act* (Philanthropy is defined by the Lilly School of Philanthropy at Indiana University as “*voluntary action for the public good*”).

### 4. Don't apologize for asking people to help repair the world.

**This is a noble cause.** When you walk in the room, you must “take off yourself” and “put on your organization”.

- **Don't fear rejection.** If someone declines, they are not rejecting *you*. They are passing up an opportunity to make a difference.
- **You are not begging.** You are offering an *investment* – a way for people to make a transfer from their financial portfolio to their social portfolio.
- **Exude confidence** (don't ask the donor to meet a financial goal; ask them to meet a social goal). Assume the person you are talking to cares (most do!); remind them that you know they will give as generously as they can.

### 5. People respond to **STORIES** first; numbers second.

**Look for an emotionally compelling story that demonstrates your mission;** then ask your prospect to be the hero and prevent an unhappy ending. If you can tell a story about someone whose life was improved as a result of your organization's work, donors can multiply by the thousands of other people -- each with their own stories -- who will be helped.

## 6. Fundraising is not about money; it's about relationships.

**Get the visit and you will likely get the gift.** Prospective supporters must perceive that you care about *them* and how they might *benefit* from becoming more involved/invested with your cause. Your goal first is simply to get the visit by showing you have an interest in getting to know your prospect better. Sitting face to face is far more effective than a letter or even a telephone call. Studies show that you are 85% on the way to getting the gift when you get agreement on an appointment.

### What to say

- Identify yourself in the first sentence or two as a volunteer, so that the donor knows you are not a paid solicitor.
- Tell them you want to meet with them in person to discuss the issues they care about, and how they can address those issues *through your* organization.
- Ask for a convenient time to meet at their home or office.<sup>1</sup>

### How to say it

- Your enthusiasm is important. On the phone to arrange the visit, if you smile, the donor will hear the effect even though he or she cannot see you.
- It often helps to stand while you talk on the phone. This infuses your voice with energy.

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<sup>1</sup> **If asked to do the discussion on the telephone**, say that it really is too important to do that and reiterate that you will come to their home or office at a time which is convenient for them. It may help to mention that you think the discussion will only take 20 minutes. (If the donor truly sticks by a refusal to meet in person then a telephone call is better than nothing. However, you may want to make an appointment for a call at a specific time so that they are setting aside some time for you. When you call to make the appointment for the visit, you need to be prepared for the whole discussion in case you cannot avoid doing it on the phone that very moment.)

**If asked whether you will be asking for a donation**, answer with an unequivocal "yes". Also let them know that, *equally important*, you look forward to this as an opportunity to meet them personally, get their advice and feedback about the current and planned activities of your organization – and how these can make the greatest positive impact. It's fun to meet people who share your values!

## 7. Make a friend.

**Do your homework before the visit so you can talk to your donor about areas of interest to them.** Think about (a) the donor's areas of interest, (b) whether the donor might want to make a donation in honor of someone, and (c) whether it will be helpful to have another member of the organization's staff or a trusted peer with you.

**You have two ears and one mouth; use them in that proportion.** When you meet with friends you engage in give and take. That's exactly what you want to happen with your donor. Don't just make a speech. Often, a good discussion will proceed as follows:

- (a) Break the ice to establish rapport (e.g., make a comment on something you notice in their house; ask about their family or their plans for the week-end, etc.);
- (b) Brief statement by you about what the organization has achieved and the vision for addressing unmet needs by expanding core programs and/or adding new projects to help underserved people or unaddressed needs;
- (c) Ask the prospect what they think by using open-ended questions. Listen to comments and suggestions from the prospect; and
- (d) Ask for an increased gift to accomplish the important things which the donor cares about. By this time in the conversation you may have an idea of specific things they want to support or you may have a sense that they simply think your organization does good things generally.

## 8. Ask for a specific amount.

**You are much more likely to get an appropriate gift if you ask for a specific amount.** People want to know why you need their gift and how it will be used. "*Whatever you can give*" is not helpful. Your donor has no idea what will make you happy, and you may not raise enough to get the job done.

**Try something like "Will you consider a gift of \$xx, xxx this year?"** It's respectful, while also establishing a guideline.

**Don't pussyfoot around asking for what you need.** It's a straightforward question. Avoid saying things like "*I know this is a lot, but I hope you will think about...*" For the most part, everyone you ask for a major gift is capable of making that gift. Your donor is entitled to make their own choices about what to support and how much support to give. Don't shoot yourself in the foot by making excuses

for them before they have a chance to weigh in. Make your compelling case for a significant gift – that’s what you’re there for!

## 9. Silence is golden.

**Let the prospect respond.** Rarely will you have to wait more than 17 seconds (although it may seem like longer). Count silently under your breath while you wait for your prospect to speak first. Avoid the temptation to jump in and say “If the amount I’ve asked is too much, would you consider a smaller gift?”

## 10. Embrace objections.

**If the prospect does not commit, work with them.** It is, of course, important never to appear ungrateful or appear to be basing the call on guilt. However, if the donor asks for time to think it over, offers a gift significantly lower than requested, or appears unsure of what to do; it may be useful to ask whether this hesitation is because of questions about:

- Your organization
- The particular project
- The amount
- The timing

**If they like the organization and they like the project,** then you’ve just got to persuade them the amount makes sense. You can often approach this by showing a gift chart, and indicating where you were hoping the prospect’s gift might fall (i.e., you need them to be a “leader” or a “founder.”). Sometimes you can suggest they go in with some of their friends. And sometimes they may be able to pay off the commitment over two calendar years.

**If timing is the issue on an annual gift,** remind the donor that you can accept an intended gift commitment, provided it is a firm amount and the donor intends to fulfill the commitment by the end of the fiscal year. A verbal commitment to you is sufficient; no written form is needed.

**If timing is the issue on a capital gift,** suggest working out a payment plan over a few years. This is a great way to work with a donor who is currently completing payments on a pledge for another organization. Tell them you’re happy to wait until they’ve completed that pledge before they begin payments on yours.

**If you get a question to which you don't know the answer**, you can say that you will find out and get back to them. If you hear an objection to the organization's leadership, management or particular activities, you may find it effective to acknowledge the genuineness of how the prospect feels, and then suggest an alternative way to think about the issue.

**Be prepared for a question about your own gift.** Sharing that you have made a gift which is meaningful to you may help in a successful outcome.

## 11. Close with a commitment to something.

**If there is no resolution, set a time when you will get back to the donor** for a reply. If you don't get a gift, close your visit with a commitment for another conversation (perhaps after they've had time to think about, talk with their significant other or an advisor and/or review materials that you've promised to send them). Express thanks for their time and for whatever commitment has been made.

## 12. Follow up.

**Make sure your solicitation doesn't end with a thud.** If you're a volunteer, report back to the development department about what transpired. Based on your report, the development staff can follow up as necessary. If you report an intended gift, the staff will promptly send the donor a written thank you, acknowledgment and payment envelope. If the donor needs further information, it will be provided.

**A thank you note written personally by you** to the donor will always be appreciated and helps cement the relationship.

## 13. JUST DO IT!

**The people you are talking with care about helping others.** *Most people do.*

**You'll have done enough research and cultivation to have "qualified" this prospect** (or someone on your staff will have done this) by the time you find yourself in the situation where you're calling on them to ask them for a major gift. In other words, you'll be relatively confident this is someone who genuinely wants to get more engaged with your cause.

**You are not so much asking them to part with something as providing them with the opportunity to do something they will be happy to do.** And that makes this effort worthwhile for both of you.

**The number one reason people give is because they are asked.** I like to quote hockey great Bobby Orr who said:

*“100% of the shots I don’t take I don’t make.”*

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## Sample Script

Hi Lois! I’m Sandy, and I’m so happy you agreed to meet today. Thanks for all your past support. I’m looking forward to chatting today and seeing if there’s a way we can help others so they won’t have to go through what you went through.



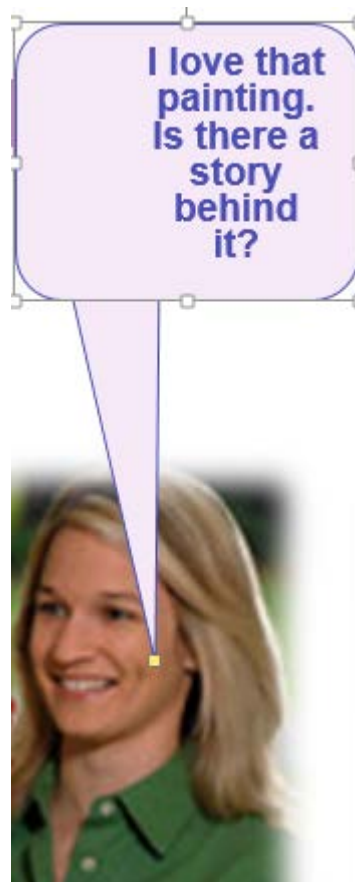
*Introduction*



**Open by introducing yourself, explaining the reason for your visit, thanking the prospect for their previous support and introducing a brief statement of the need for investment.**

When you walk in the door you want to remind your prospect why you're there. Of course they know why, but just like when the telephone repair person arrives and says "Hi I'm here, as promised, to fix your phone" it's reassuring to know you're there according to a plan and you're going to help them.

Also, if you can, refer back to the reason your prospect cares about your cause. Often it's because they or someone they know was helped and they want to give back.



### *Warm-up*

**Start with a five minute warm-up period.**

Break the ice by following up on something the donor mentioned in your last meeting. Ask about children or grandchildren. Or ask about a photo or piece of art you see in their home.



Your support, informed by the personal experience you had here, has put us on the map for this cutting-edge clinical care. Today we have a chance to take this to the national level. Let me share a story with you...

### *Need and Opportunity to Make a Difference*

**Carry over your understanding of what motivates this donor into making your case.** Hopefully by the time you're in the room with your prospect you have a pretty good idea about which needs and opportunities float your donor's boat.

As much as you can, **tie the donor personally to the current need and the project** for which you're making your case. Often it's an experience they or their family or a friend went through. Or it may just be that they attended an event where they learned first-hand about your cause from someone who was helped. Tying your donor personally to the need is a good way to transition from the need to how they can help.

**Tell a story** to outline the impact gift will have. It's the oldest form of human communication; people are wired to listen better to stories. More and more evidence points to the fact that stories help people lower their defenses. While folks look at pie charts and spreadsheets with their dukes up, ready to refute the data, they enter into the story, ready to be a part of it. People hear stories with their hearts; not their heads. And hearts are what compel action.

**Show the prospect how to give this story a happy ending.**



### *Conversation Using Open-Ended Questions*

**Uncover people's values using open-ended questions.** Askers need to learn how to create a productive conversation that centers on the donor's interests. Did you ever have a "heart to heart" with your Mom? Best friend? Spouse? A lot is about getting your donor talking to re-affirm their strong feelings and emotional attachment.

This generates the donor's own thinking about your issue. It encourages them to ponder your presentation, to digest your material, to really think about it and to ask questions.

Listen carefully and note when your prospect's eyes light up. Now you can talk more about this! The ultimate sign that you're "in the money" is when you hear the donor to say "we;" not "you." Listen for this. It means she is BOUGHT in!

Will you consider a leadership gift of \$X to make this project happen? Our community has been trying to get this program off the ground for years, but it's especially critical now because we have so many more seniors living on fixed incomes who can't afford proper nutrition... it will make a real difference in quality of life.



***Specific Amount, Purpose and Motivator; Convey Urgency***

**Whatever amount you ask for, make it specific.** Take the burden off of the donor to figure out what size of a donation is necessary. This should be the amount needed to bring your project to fruition. Don't be wishy-washy or make your donor try to guess how much to give.

**Tell your prospect the amount needed for a specific purpose that resonates with this donor.** If it's going to be an unrestricted ask, at least specifically describe what the impact of the gift will be.

**Key into donor's motivation to give.** It may be a religious or spiritual value, a desire to give back, a yearning to be in a select group of leaders or a wish to have their name in lights. Think about this in advance.

**Give a reason the gift is urgent now.** There are lots of folks competing for donor dollars, and people want to give where they'll do the most good. There's got to be a compelling reason you're asking for this amount at this time (not just, "*well... another year has rolled around and it's that time again.*")



*Wait Patiently for Your Answer*

**After you ask, your secret weapon is pointed silence.** Our culture HATES silence. We want to fill it. Often the thing your prospect really wants to tell you won't be said if you quickly fill the silence. You definitely *do not* want to jump in and say *"Perhaps I've asked for too much. Would you consider a smaller gift?"*



*Close Happy*

**Thank your donor for their commitment.**

**Remind your donor of the benefits, results and positive impact their gift will have and reiterate the urgency** of their support. Make them feel super good for swooping in at the right time to save the day!

If you don't get a gift this time, fear not! All is not lost.

1. Express gratitude for their time.
2. Promise to get back to them as appropriate.
3. Try to get a date to come back with answers to questions raised.
4. Get them involved with you in other ways ... ask for advice ... invite them to join a focus group, an advisory panel or a committee.... See if they're interested in a volunteer commitment.

The long-term relationship is more important than the size of the gift in one year.

## **SUMMARY:**

### **Focus on impact.**

The money will follow.

### **Don't think about asking as "begging" or "arm twisting."**

Think of it as "facilitating" philanthropy.

### **Help your donor do what they want to do.**

This requires listening closely.

### **Don't forget to ask for something specific tied to the impact it will create.**

Donor prospects appreciate the truth.

### **Give immediate, thorough feedback.**

Donors need to be reminded they made a difference.

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## **To Your Success!**