Asking in the Age of Zoom: How to ask for a major gift online
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The language

Precise
Respectful
Easy for donor to digest
Present the opportunity technique #1: Ask for a specific amount

So Diane, would you consider a gift of $10,000 to support [nonprofit]?

*Restricted gift*: If it has become clear during the course of the conversation that the donor wants to support a specific initiative or “priority,” then it’s: to support <restricted program/project>
Ask for a specific amount variation: Multi-year

Multi-year ask format:

1. annual amount
2. # of years
3. Do the math

So Diane, would you consider a gift of $15,000 per year for three years for a total of $45,000 to support nonprofit [or restricted project]
Once you present the opportunity, remain silent

- Do not speak before the donor responds.
- Why remain silent?
  - Speak and you will be negotiating against yourself!
  - Speak and you will be creating a distraction—give the person space to consider your request.
  - Use the time to observe core reaction.
Anatomy of a donor visit

Most Zoom visits run 30-40 minutes; in-person 45-60. Allow for up to 90.
Today’s Agenda

✓ Ask technique #1
  ◆ Introduction: Why people give and what donors want
  ◆ Setting up the donor visit on Zoom
  ◆ Having the donor conversation

✓ Ask technique #2

◆ Concluding the visit

◆ Appendix A: Responding to pushback around setting up the donor visit

◆ Appendix B: Questions to get to know the donor better

◆ Appendix C: Responding to “let me think about it” and other non-”yes” answers
What donors want

1. To be part of a big idea/vision that is important to them
2. To know what you are doing with their $--and that you did it before you asked again
3. To be thanked promptly and personally
Why people give

Individual donors give based on emotion. (They may justify with logic and/or make certain you will be a good steward of their gift.)

Language implications:
- Stories, **not numbers**
- “Word pictures,” **not jargon**, e.g., “We want every child to be able to read, write and be successful,” not “education reform.”
Whose story?

How does the donor’s story entwine with your organization’s mission/vision?
Fundraising reframe

An “ask” is not a painful extraction of funds. Fundraiser as “guide.”

An “ask” is a gift: You are giving the donor the opportunity to make something happen that matters to them—the place that the donor’s story intersects with your work.
Setting up the donor visit

Get an appointment... with a donor... to ask them for money

Get a visit... to learn how the donor’s life story intertwines with your work and present opportunities to make a meaningful difference
Why Zoom visits?

1. Fundraiser or donor is not comfortable visiting in-person.
2. Some donors prefer Zoom (which is preferable to phone).
3. Geographically dispersed donors and limited fundraising resources.

Note: That said, see if you can group donors geographically (I’m going to be in <city> in three weeks...) and “get on the plane” when possible for asks $10K+.
Setting up a Zoom visit: A donor you know

The goal is to get to the calendar:
• Suggest two dates and times
• Be prepared to have the conversation then and there (just in case)

After you say who you are and see how the donor has been:

◆ Ordinarily, I would suggest that we get together for a visit. That said, we’ve had many thoughtful conversations over Zoom lately. If you are willing, let’s schedule a Zoom visit. 45 minutes should do it. How is date/time1 or date/time2? [If no to Zoom, try for phone, e.g., I get that you are not up for Zoom, Susan, how about we find a time for a phone call—how is <2 dates/2 times>?]
Donors you don’t know well (or with whom you have never spoken)

Option 1: Prepare the donor for your outreach by having the CEO/ED or referral source let the donor know you will be contacting them.

Option 2: Reach-out directly (donors are de facto NOT cold calls).
Donors you don’t know well (or at all)

◆ Option 1: Predispose

From ED or referral source, e.g.,

- [The problem that needs to be solved]. [Nonprofit] is committed to [vision—but conversationally].

- It is important that you, as a <member/supporter/community leader>, know what we have in mind.

- It is equally important that we know what you think.

[Grab attention with a visual, if you have one.]

Close with: One of our board members/staff members, <name>, in whom I have the utmost confidence, will be following up with you to set up a visit. Be on the look out for a call from xxx.xxx.xxxxx.

Tip: Use staff titles that are appealing to donors. Not surprisingly, Dr. Russell James’ research says x CDO/Director of Development/Advancement. Try a title with “Donor” in it.
Then, get on the phone

Hi Steve, This is <name>. I’m a board member/the <title> at <nonprofit>.

I’m following up on the <email/note> you received from <name of person who referred you> and I’d like to suggest that we get together for a Zoom visit to talk about <nonprofit> --next Tuesday morning the <date> at 10:00—or would Wednesday afternoon at 2:00 be better?

If you have to leave a voicemail: You can reach me at <phone number> (slowly and clearly) and I’ll also send you a text as that might be more convenient for you.

And then text: Per my voicemail, this is <your name> referred by <referral source> looking to set up a Zoom to talk about <nonprofit>. How is <2 dates/times>?

(For in-person, offer home or office, whichever is most convenient, instead of Zoom.)

And smile. Research shows it matters. And standing, too.
Option 2: Existing donors are not “cold calls”

If you are comfortable, get on the phone directly:

This is <full name/title> from <nonprofit> and I’m calling to set up a Zoom visit to talk about <nonprofit>. How is <two dates/two times>?

If leaving a voice mail: In addition to how to respond to you: I’ll also send you a text, in case texting is more convenient for you.
Balance persistence and pestering

- After the first try, wait two weeks and try again.
- Then, wait 30 days and try again.
- After that, reach out in at least two ways every 60 days.
- **Tip:** At month 3, use LinkedIn and see if you can’t find a connector.
- **Tip:** At month 6, send a content only email, e.g., *I thought you might be interested in this* <article, programmatic video,...>. No visit request. Just content.

Do not default to email. Get on the phone! Phone/text is proving very effective. Test.
Having the conversation: Donor Conversation Driver

- A three-part visual framework that drives the donor conversation
  - Section 1: Why you matter/Problem that needs to be solved
  - Section 2: Three funding priorities
  - Section 3: Funding plan
- Easy to ask for permission to discuss funding
- Customizable

Acknowledgement and gratitude to forimpact.org/The Suddes Group for creating the Donor Engagement Tool on which the Conversation Driver is based.
The Donor Conversation Driver serves **one** purpose

**It is not:**
- A brochure
- A mailer
- A flyer
- A website page
Donor Conversation Driver

**In-person**

- 18x24 sheet of paper folded in thirds (11x17 minimum)
- Bring markers and sit adjacent/next to your donor if possible
- Encourage:
  - Scribbling important words
  - Circling important points
- Bring extra copies

**Zoom**

- 3 slides for the front and 2-3 for the back  OR
- One over-sized document—designed so you can “reveal” one section at a time
- PDF for post-Zoom visit email
- Once you are comfortable presenting on Zoom:
  - Slide Show mode/Presenter view
  - Click on the Pen button
  - Use highlighter or pen
Sample opening question: I’m interested in your story Joan. For starters, how did you become interested in <nonprofit>?

Priorities for the next 1,000 days

Priorities/What Altitude: Rooftop

Key question: So which priority interests you the most, Joan?

Before you leave section 2: Would it be ok if we looked at the funding plan for the priorities?

Plan/How Altitude: Ground

Funding Plan: Today Tomorrow Forever; Goal w # gifts; Impact examples

How you can help:
1) Champion...the organization
2) Invite...others to ENGAGE
3) Invest...with commitment that reflects desired impact

Ask then Shhh
Campaign example using slides

Slide 1

Purpose/Why Altitude:
Aerial

Slide 2

Priorities/What Altitude:
Rooftop

Slide 3

Activity/How Altitude:
Ground

Molly Harding Nye Gallery Priorities

Lighting and fixtures that support a compelling gallery experience
First-class Gallery

Community Engagement
Accessible to All

Welcoming everyone: Lift and accessible bathroom

Building an inclusive artistic community and welcoming a diverse public in the Molly Harding Nye Gallery.

The New “Face” of LexArt
A street-facing gallery facing participation in a vibrant art and social scene.

The Maker Movement
Engaging people of all ages to learn, create, share.

LexArt

Campaign Goal: $700K
Raised-to-date: $373K
including $250K lead gift from Joe Nye

LEX ART

Lexington Arts & Crafts Society, 130 Waltham Street, Lexington, MA 02421 781-862-9696 LexArt.org

HOW YOU CAN HELP
1. CHAMPION
   The benefits of “making”

2. INVITE
   Others to be engaged.

3. INVEST
   To have the impact you’d like to see.

Donor Recognition Naming Opportunities (partial list)
- Lift: $100K
- Accessible Bathroom: $50K
- Front Desk: $25K
- Lighting: 3 @$10K
- COVID-quality air handling: 2 @$25K
- Sponsor an exhibition: $10K
- Donor plaque: All gifts of $10K+

Gifts of all sizes are greatly appreciated and impactful.
Funding Priorities: Focus on Impact (not how)

- Major gifts are often used to fund new initiatives. Those new projects become your funding priorities.

- To fund on-going work: “Projectize,” meaning highlight the impact of your primary areas of focus.

- Why funding priorities are effective:
  - Reassuring to donors that you have a plan.
  - Learn more about donor interests.
  - Allow donors to clearly see what their money is going to do— independent of whether or not they make a restricted gift.

- Funding priority examples
  - Mentor the next generation
  - Engage diverse audiences
  - Accessibility
  - Expand...
  - Train...
  - Launch a....
  - Deep dive into...
  - Improve...
  - Save...

Will a donor quickly grasp the priority and find it compelling? (No jargon!)
Funding Plan Format Examples

1. Ties impact examples back to the priorities.
2. Defines a leadership giving range, e.g., $5,000-$50,000; $10,000-$100,000; $25,000-$250,000...
Flip side of Donor Conversation Driver

Your nonprofit “at a glance”—what would a prospective donor want to know?

- **Financial summary.** Donors need context for their giving. Are they giving to a $1M nonprofit or a $20M nonprofit? Will you be good stewards of their gift? Use audited/actual revenues and expenses for the previous year (not budgeted)—unless you are just starting out. Pie charts create a nice visual. Include revenue & expense totals (don’t make donors do the math).

- Current staffing
- Board
- Testimonials
- Honors/awards
- What you cover
- Who you reach
- Where your work has been featured
- Partners

Stay visual!
Examples of the flip side

**CITYSIDE BY THE NUMBERS**

**2021 REVENUE**

- Corporate: 30%
- Individual: 45%
- Event: 10%
- Other: 5%

**2021 EXPENSES**

- Operations: 30%
- Programs: 45%
- Fundraising: 15%
- Other: 10%

**THE GLEANERS AT A GLANCE**

- **FY21 REVENUE**
  - $27.5 MILLION
  - FOOD RECYCLING: 37%
  - DISTRIBUTED (Expenditure): 30%
  - External: 33%

- **FY21 EXPENSES**
  - $35 MILLION
  - FOOD RECYCLING: 40%
  - DISTRIBUTED (Expenditure): 40%
  - External: 20%

- **Leadership**
  - Executive Director: Julie Frahm
  - Director of Programs: Kate Silcock

- **Board of Directors**
  - Peter Buse, Jennifer Beringer, Scott Czerny, Randon Cline, Peter Deatherage, Sue Grauer, Susan S. Maurice, Alix

**FOUNDRERS**

- Berkeley: 10%
- Oakland: 40%

- Wheeler Meals for Berkeley's Most Vulnerable Citizens
- Bay Area Community Foundation
- Sonoma County Agribusiness

**About LexArt**

**LEADERSHIP**

- President & Executive Director: Matthew Siegel
- Development Director: Wray Davis

**Supporting, encouraging, and inspiring artisans at all stages of their creative journey and promoting community engagement with art and craft by providing studio space, gallery shows, classes, workshops & special events.**

**Molly Harding Nye Gallery Campaign**

**The New “Face” of LexArt**

- Focus on new gallery opening, participation in a top-giving matching campaign, and socially relevant art, such as food, classes, & events.

**Galley Campaign Budget**

- Fundraising Goal: $700K
- Budget:
  - Handicap Accessibility: 1115K
  - Programming & Exhibitions: 100K
  - Exhibits: 175K
  - Climate Control: 45K
  - Campaign Expenses: 15K

- Total: $327K

- Artwork by Paul Hunter Architects
Ask #2: The Clueless Close*

The Clueless Close is ideal for situations where the donor has financial means and is clearly enthusiastic about your project/initiatives, but:

1. You are close to the donor—a colleague, close friend, or family member where it would be awkward and out of place to ask for a specific amount.

2. Your prior relationship with the donor is limited. It may even be a first time visit, during which it’s clear the donor is enthusiastic or even expecting an ask.

3. You are not feeling confident.

* With gratitude to forimpact.org.
Clueless Close example

I realize that you’re just learning about our plans [or we’re good friends] [or we’ve just met], <first name>, but given your interest in [nonprofit/project/the community]... I don’t know exactly where to go from here other than wanting to be sure you have the opportunity to make the kind of difference we’ve been talking about.... As we’ve discussed, our leadership giving ranges from $10,000 to $100,000.

So, tell me <first name>, where do you see yourself?

1. Frame the situation (be authentic)
2. Restate leadership giving range
3. Ask
The two techniques

◆ **For a specific amount**
  - **When:**
    - You know how much to ask for
    - Donor has a track record of giving to your organization
    - Lead/large gift
  - **How:**
    - **One-time:** So Diane, would you consider a gift of $10,000 to support <nonprofit or project>
    - **Multi-year:** So Diane, would you consider a gift of $10,000 a year for three years for a total of $30,000 to support <nonprofit or project>

◆ **The Clueless Close** (thank you forimpact.org)
  - **When:**
    - You are too close to the donor to ask for a specific amount
    - You don’t know the donor well
    - A smaller donor is very wealthy and philanthropic
    - You are uncomfortable or uncertain how much to ask for
  - **How:**
    - Authentically acknowledge the relationship/situation
    - Restate the leadership giving range
    - Ask, e.g., Where do you see yourself?

And then: Shhhh…..
The donor says “yes”

- Big “thank you”
- How would you like to make your gift?
  - Check
  - Credit card
  - Stock (mentioning stock is a great way to get donors thinking about using assets for gifts vs. cash)
  - Some other way? (They may have a donor-advised fund or a trust.)
- Gift or Pledge Form
Unless you are at “yes,” set a follow-up date

- Try for the Zoom first. “So Steve, I understand that you want to consider this opportunity. Why don’t we Zoom again in two weeks. I’ll be right here to answer any questions you may have.” If “no” to follow-up Zoom, then “let’s set-up a phone time – how about <offer 2 dates and times two weeks out>.”

- Record visit notes!

If skip this step, you will find yourself chasing after the donor—even if the donor wants to give!
Appendix A: Responding to pushback about setting up the visit

1. **Say something!** Persistence (within reason) signals commitment. Test various responses.
2. **Restate objection to show you are listening:** I get that you are <objection>.
3. **Remind about importance of the cause:** We’ll be talking about <cause>.
4. **VIP:** You’re and important/longstanding <supporter, member…> so it is especially crucial we hear what you think.
5. **Thank you for being a generous/philanthropic person and…** <for any response related to their giving>.
6. **Ask for advice.** I understand that you are <busy, already gave, know what you do…>…which is why your advice will be so valuable.
7. **Flip the objection into a positive:** That’s exactly why it’s important we speak with you.
8. **Normalize the objection:** Many of our top donors say the very same thing and what we’ve found is that…
9. **Propose a “no ask” visit**—and keep your promise!
10. **Ask for 15 minutes.**
Appendix B: Sample questions to get to know the donor better

Overall frame: I’m interested in your story, Joan.

- For starters… what drew you to <your nonprofit>? or How did you first learn about <your nonprofit>?
  - Depending on answer/type of nonprofit: Do you have any sort of personal connection to the mission?
- I’m curious, how would you describe <your nonprofit> to your friends?
- Deepening: We’re so appreciative that you are a donor. I’m curious Joan, where did you learn to give?
- What was the best gift you ever gave—to any organization—and why so?
  - For someone who is philanthropic and you know to be family-oriented: If you had a family slogan, what would it be?
- So I have an overall framework, where does <nonprofit> sit in terms of your giving priorities?
Appendix C: Responding to non-"yes" answers

You’ve made the ask and you then remained silent until the prospect responded. Likely, you did not receive a flat out yes.

- **Goal 1:** Create space to learn more about what the donor is thinking and find out if any additional information might be helpful
- **Goal 2:** Let the donor know there are gift timing options, if applicable
- **Goal 3:** Set-up a time for the next conversation

**Note:** Unless you hear: *There is absolutely no way in the world I can do this,* do not negotiate the amount in response to “let me think about it.” Trust your donor research.
Appendix C: Feel, felt, found

Feel, Felt, Found creates **empathy**, normalizes the situation, and heads the donor toward a **desired behavior/next step** (only use once in any conversation)

- **Feel:** *I know how you feel*
- **Felt:** *I felt the same way when I.... OR Many longstanding supporter like yourself with whom I have spoken felt the very same way*
- **Found:** *What we’ve **found** is that <desired outcome>, e.g.,*
  - Donor mentioned **talking to spouse/partner**: setting up a time to include your spouse in the conversation and have me available to answer questions right on the spot works out really well...how about...
  - Donor said “**I have to think about it**”: it can helpful to spend a few minutes discussing how you’re thinking about this opportunity to be certain I haven’t left anything out that might be useful to your decision-making. For example, I wonder, Joan, if there is anything we can do with the timing to make this gift possible for you...”
Giving is good for your health

- Biologically, giving can create a “warm glow,” activating regions in the brain associated with pleasure, connection with other people and trust.

- In a 2006 study, researchers from the National Institutes of Health studied the functional MRIs of subjects who gave to various charities. They found that giving stimulates the mesolimbic pathway, which is the reward center in the brain, releasing endorphins and creating what is known as the “helper’s high.” And like other highs, this one is addictive, too!