



Non-Profit
Collaborative

PRESENTED BY

EP Enterprise Bank
CREATE SUCCESS

Member
FDIC

Asking in the Age of Zoom: How to ask for a major gift online October 18, 2022

Presenter:

Diane G. Remin, President

diane@majordonors.com

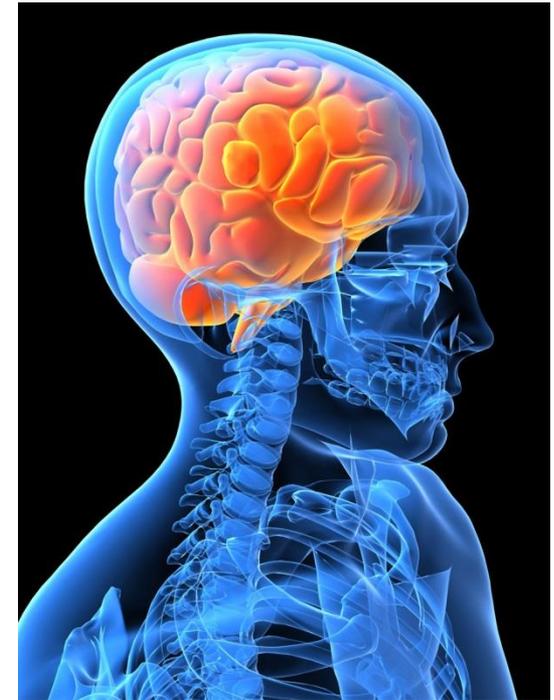
617.596.6086 (direct)

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

**Smaller
(annual)
number first!**

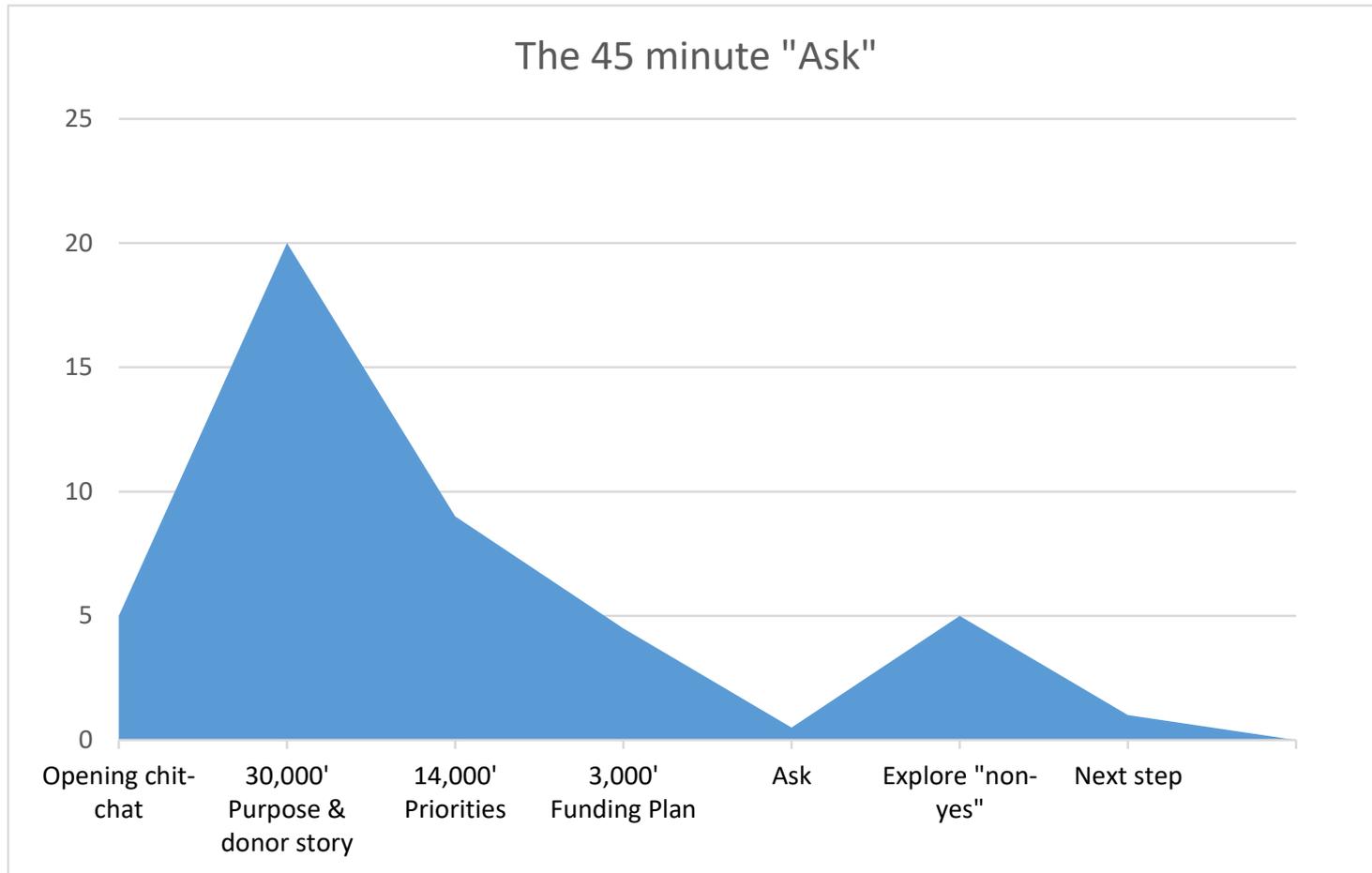
So Diane, would you consider a gift of \$15,000 per year for three years for a total of \$45,000 to support nonprofit [or restricted project]

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



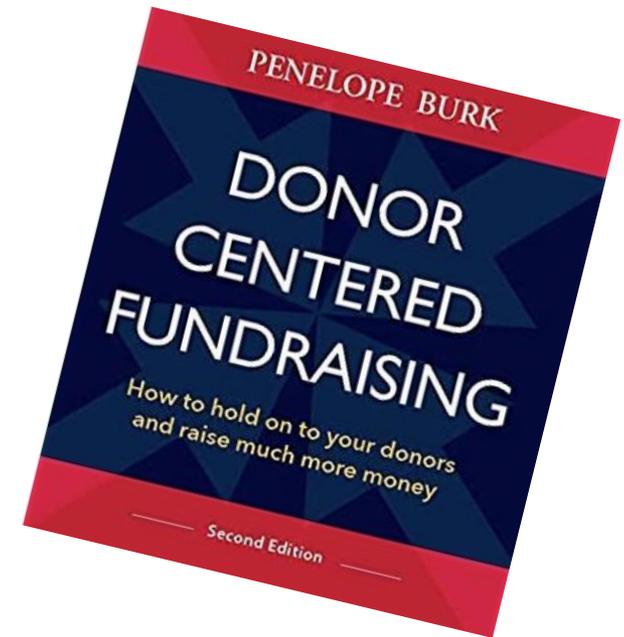
Most Zoom visits run 30-40 minutes; in-person 45-60. Allow for up to 90.

Today's Agenda

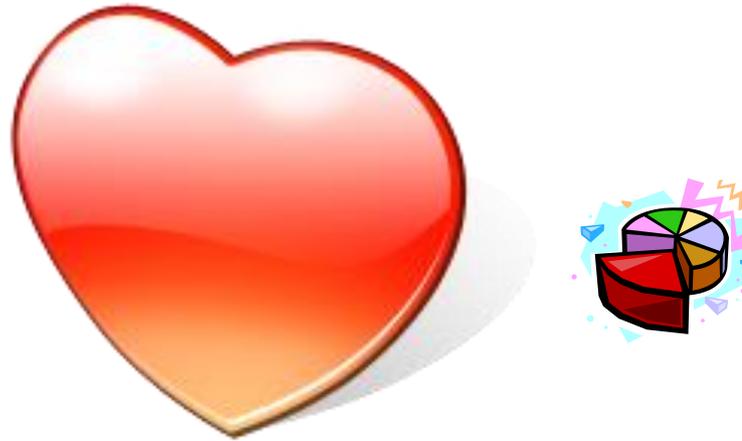
- ✓ Ask technique #1
- ◆ Introduction: Why people give and what donors want
- ◆ Setting up the donor visit on Zoom
- ◆ Having the donor conversation
- ◆ Ask technique #2
- ◆ Concluding the visit
- ◆ Appendix A: Responding to pushback around setting up the donor visit
- ◆ Appendix B: Questions to get 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.xxxx.



<Logo>

Date

Susan Sample
10 Main Street
Anywhere, MA 02116

Dear Susan,|

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.



SMS



Sample Series

Do not default to email. Get on the phone!
Phone/text is proving very effective. Test.



Having the conversation: Donor Conversation Driver

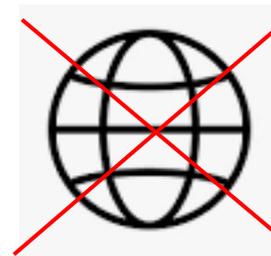
- A three-part **visual framework** that **drives the donor conversation**
 - Section 1: **Why you matter/Problem that needs to be solved**
 - Section 2: **Three funding priorities**
 - Section 3: **Funding plan**
- Easy to ask for **permission to discuss funding**
- **Customizable**

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

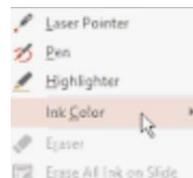
In-person

- ◆ 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



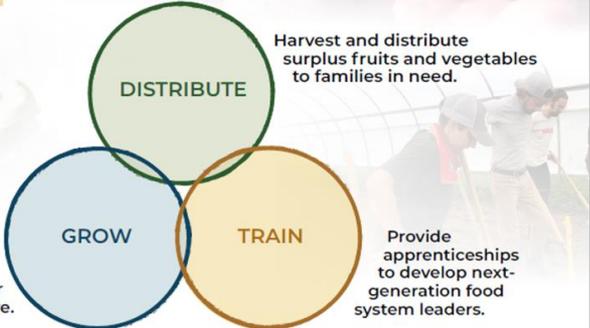
BOSTON AREA GLEANERS
FROM FARMS TO FAMILIES




GLEANING is recovering surplus crops that would otherwise go to waste.

Many households lack access to healthy, affordable food. This is not a supply issue! Millions of pounds of fruits and vegetables are going to waste each year—on local farms.

PRIORITIES
for the next 1,000 days



WAYS TO HELP

Champion the cause of universal access to affordable healthy food
Invite your family, friends and colleagues to learn more about the Gleaners
Invest in reducing food waste and getting healthy food to those who need it

- TODAY**
- Engage with us on social media
 - Sign up for our Newsletter
 - Volunteer
 - Attend events

TOMORROW

Annual Goal: \$350,000
— examples of impact —

1 at \$100k	Operates the farm for a season
2 at \$50k	Fuels our fleet of trucks
4 at \$25k	Funds a seasonal apprenticeship
5 at \$10k	Healthy produce for 2,000 people per week

All gifts of \$10k or more will be acknowledged with a tree planted on the property.



The Model

Purpose/Why
Altitude:
Aerial

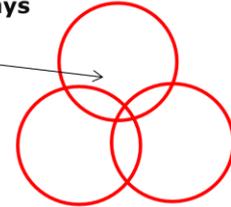
How you save/change/impact lives. Why you matter. The **PROBLEM** the donor will be impacting. [A visual plus text.]

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

One word or phrase per circle



Where funds will be used... examples of projects/programs to be funded

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?**

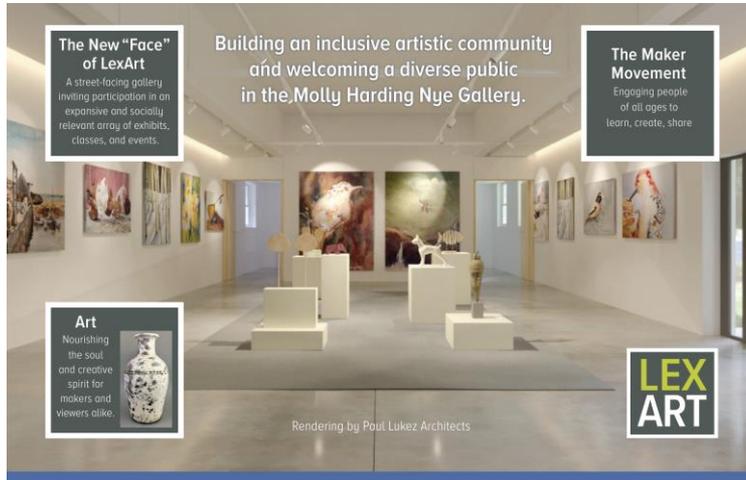
Plan/How
Altitude:
Ground

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

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

↓
Ask then Shhh

Campaign example using slides



Purpose/Why
Altitude:
Aerial
Slide 1

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

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.

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

Molly Harding Nye Gallery Priorities



Priorities/What
Altitude:
Rooftop
Slide 2

Plan/How
Altitude:
Ground
Slide 3

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

WAYS TO HELP	CHAMPION the cause of everyone having access to healthy food in your community			
	INVITE your family, friends and colleagues to learn more about The Food Project		INVEST in sustainable farming and food distribution, and the next generation of leaders	
TODAY	TOMORROW			
ENGAGE with us on social media (Instagram, Facebook, Twitter and LinkedIn)	\$50,000	Fellowship program for one region	One subsidized farmers' market	Gardens for one region
SIGN UP for our mailing list	\$25,000	Crew leaders for one region	Mobile markets on the North Shore	Materials for gardens
ATTEND a Food Project event	\$10,000	Gear for youth	Seeds for one farm	Technical assistance for garden recipients
RECRUIT a group of volunteers to help out on one of our farms	\$5,000	Alumni Outreach Fellowship	Community Program Fellowship	Build a Garden Fellowship

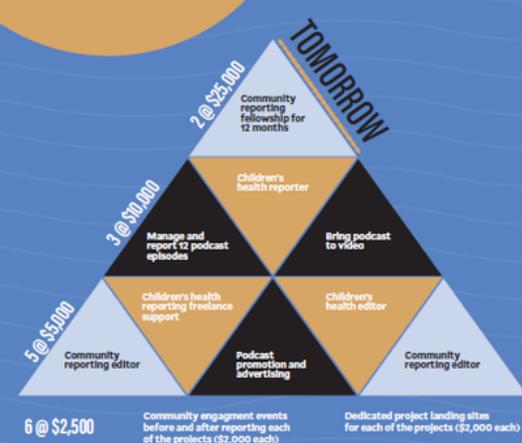
1. Ties impact examples back to the priorities.
2. Defines a **leadership giving range**, e.g., \$5,000-\$50,000; \$10,000-\$100,000; \$25,000- \$250,0000...

HOW YOU CAN HELP

- Champion the importance of quality journalism.
- Invite others to get to know us.
- Invest in PublicSource.

TODAY

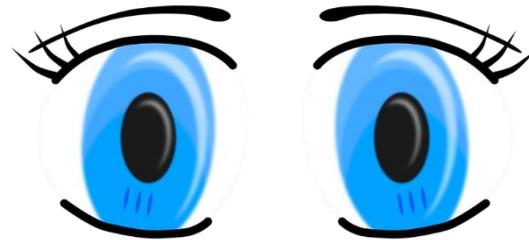
- Visit publicsource.org and read our stories.
- Share with friends, colleagues, or on Twitter, Facebook or LinkedIn.
- Subscribe to our newsletter at publicsource.org/newsletters.
- Contribute to our year-end Newsmatch campaign.



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

2021 EXPENSES



2021 REVENUE

- Corporate philanthropy: \$4,418,000
- Local sponsorship: \$2,381,000
- Foundations: \$2,000,000
- Major gifts: \$623,000
- Consumer reader members: \$695,000

2021 EXPENSES

- Marketing and operations: \$100,000 / \$177,000
- Payroll: \$2,675,000
- Admin and legal: \$75,000
- Program costs: \$249,000
- Technology: \$38,000

FOUNDERS



From left: Lance Knobel, CEO
Tasneem Raja, Editor-in-Chief The Oaklandside
Frances Dinkelpiel, Executive Editor
Tracey Taylor, Editorial Director

BEST COMMUNITY JOURNALISM
(Three-time winner)

SOCIETY OF PROFESSIONAL JOURNALISTS

THE BERKELEYSIDE OAKLANDSIDE

More than 500,000 unique visitors each month

25,000 newsletter subscribers
4,000 members

WHEELER MEDAL FOR BERKELEY'S MOST VALUABLE CITIZENS

BERKELEY COMMUNITY SCHOLARS

Cityside

Building Community Through Local Journalism

THE GLEANERS AT A GLANCE

FY21 REVENUE

\$5.75 MILLION

- COVID Relief Funding - 47%
- Contributed Support - 25%
- Earned Revenue - 18%

FY21 EXPENSES

\$4.35 MILLION

- COVID Relief programming - 50%
- Program Expenses - 27%
- Competition - 19%
- General Operating Expenses - 10%



Annually distribute 3.5 million pounds of healthy food

Work with more than 90 local farms

600+ annual volunteers

14 full-time staff, 8 part-time, 8 seasonal

A fleet of 13 trucks with a combined capacity of 170,000 lbs

23 acres of farmable land that produces 200K-250K pounds of produce annually

... through 60 hunger-relief partners and all the major food banks in the region

Molly Harding Nye Gallery Campaign

Progress towards \$700K Gallery Campaign Fundraising Goal

Funds raised to date 11/11/2020: \$373K (53% of goal)



The New "Face" of LexArt

A street-facing gallery inviting participation in an expansive and socially relevant array of exhibits, classes, and events.

Gallery Campaign Budget (remaining as of 11/11/20)

- Handicap Accessibility: \$115K
- Programming & Exhibitions: 100K
- Fixtures & Furnishings: 57K
- Climate Control: 45K
- Campaign Expenses: 10K
- TOTAL: \$327K**

BEFORE



AFTER



Rendering by Paul Lukez Architects

About LexArt

LEX
ART

LEARN • CREATE • SHARE

VISION:

Enriching lives and building community through the making of art and craft.

HOW WE DO IT

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

Board of Directors

Matthew Siegal President & Executive Director

Wayne Davis Chair

Katina Leodes Vice Chair

Joseph Brown Treasurer

Susan St. Maurice Clerk

Peter Bain

Jennifer Bergantino

Todd Carey

Nancy Cornelius

Peter Demuth

Louise Hara

Lauri Hugentobler

Peter Kelley

Victoria Nessen

Molly Nye

Jenny Pyle

Rachel Rosenblum

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.***

2 @ \$100,000

4 @ \$50,000

6 @ \$25,000

10 @ \$10,000

*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

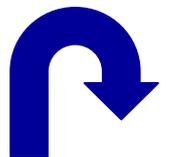
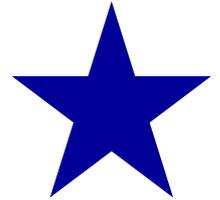
- Try for the Zoom first. “So Steve, I understand that you want to consider this opportunity. Why don’t we Zoom again in two weeks. I’ll be right here to answer any questions you may have.” If “no” to follow-up Zoom, then **“let’s set-up a phone time – how about <offer 2 dates and times two weeks out>.”**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

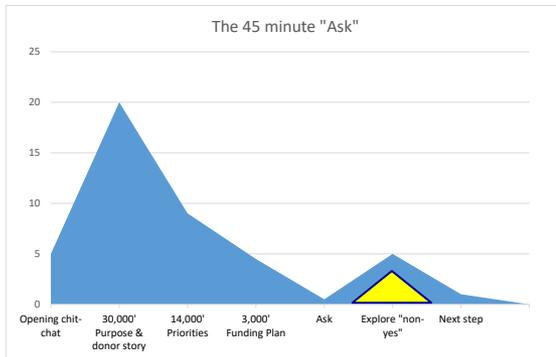


Appendix B: Sample questions to get to know the donor better

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!

