

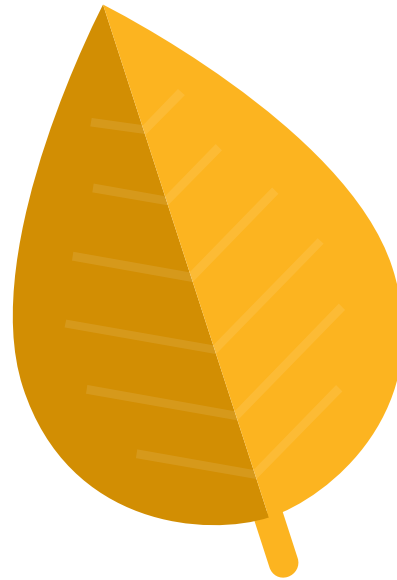
A group of people in a meeting, with their hands stacked in a circle in the center. The background is dark and slightly blurred, showing a window with a view of a building. The text is overlaid on the image.

All the Secrets to Make a Thoughtful & Successful Gift Request

Penny Echternach
Associate Vice President
Hillary Lyons Associates

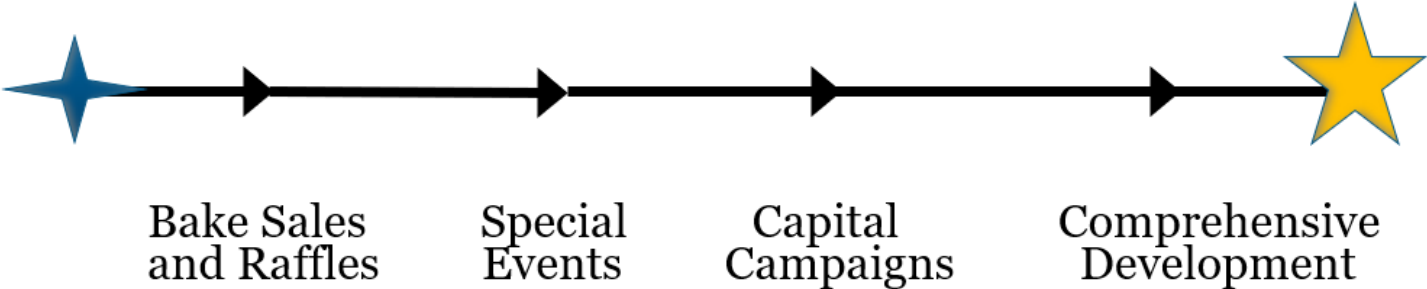
Making Gift Requests

Darn...there's no money tree!?!?





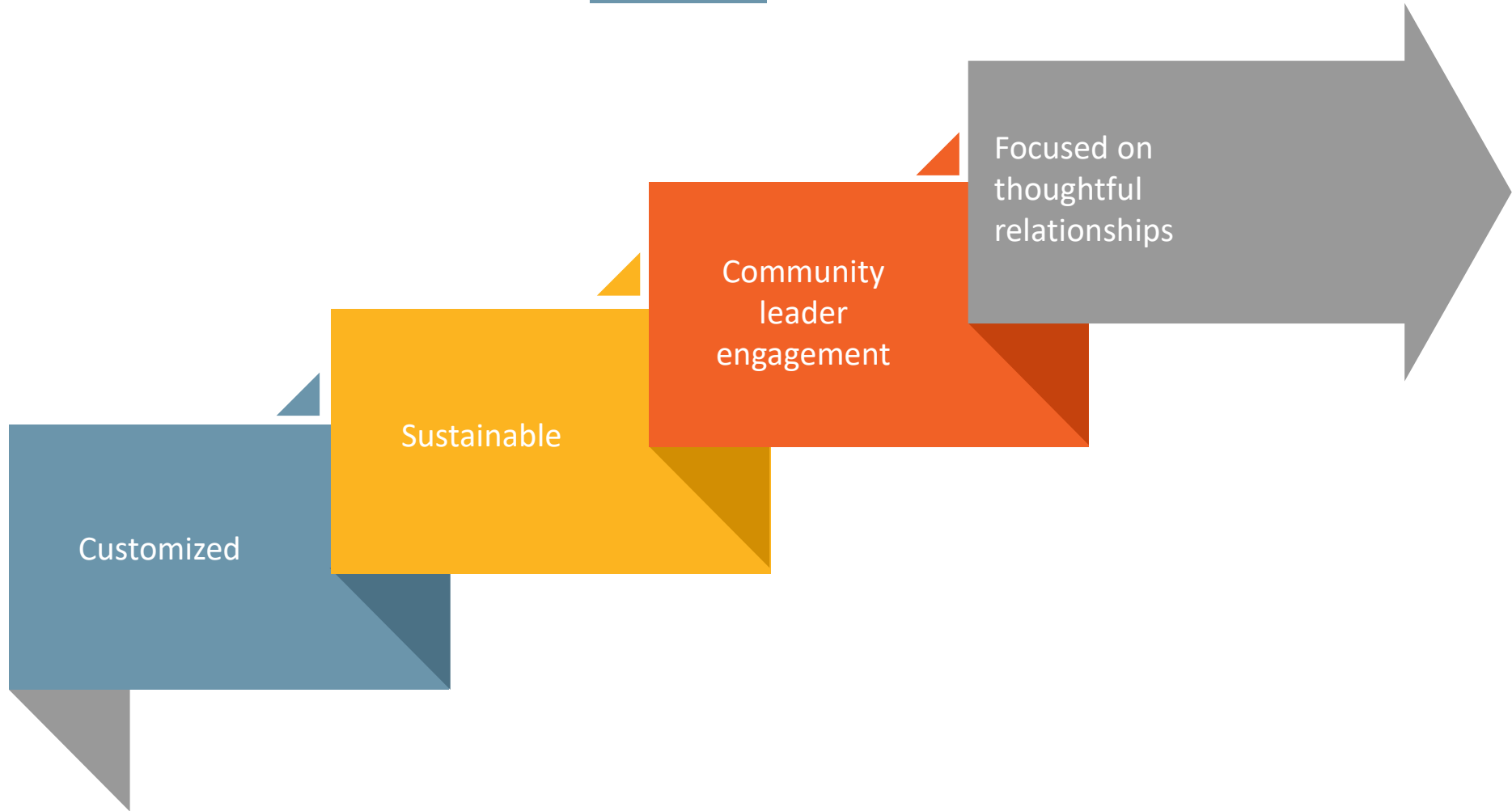
Evolution of Fundraising



Community Engagement



Goal



Success Factors

- 01 **People**
- 02 **Culture**
- 03 **Process**
- 04 **Case for Support**
- 05 **Gift Capacity**

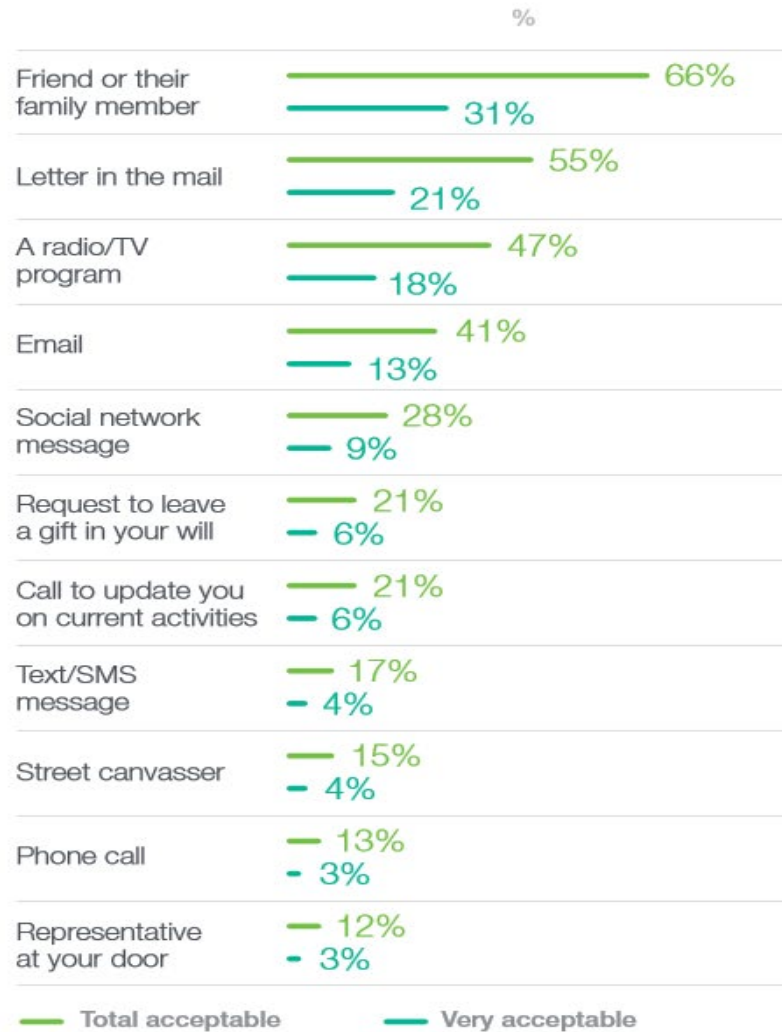


Power of Connections

How people like to be asked for a gift



ACCEPTABLE GIVING CHANNELS BY GENERATION



	GEN Z	MILLENNIALS	GEN X	BOOMERS	MATURES
Friend or their family member	71%	67%	65%	67%	60%
Letter in the mail	59%	58%	58%	54%	50%
A radio/TV program	65%	59%	51%	43%	29%
Email	54%	54%	49%	37%	22%
Social network message	50%	43%	33%	22%	7%
Request to leave a gift in your will	35%	30%	24%	17%	11%
Call to update you on current activities	44%	35%	19%	13%	13%
Text/SMS message	30%	32%	21%	9%	5%
Street canvasser	49%	27%	19%	7%	3%
Phone call	26%	25%	11%	10%	6%
Representative at your door	33%	22%	12%	7%	3%

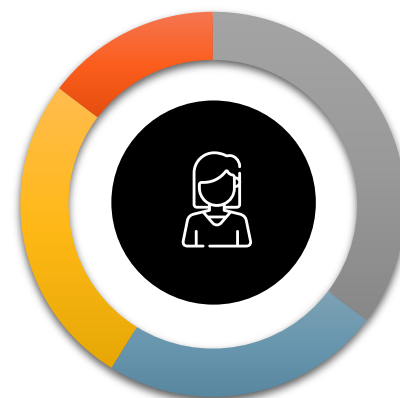
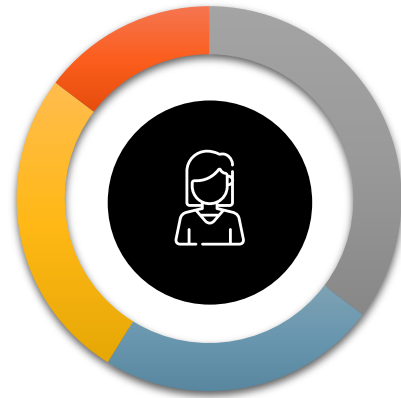
Bolding shows statistical significance between generations at a 90% confidence interval.

*Blackbaud study



Best Team Ever

Volunteers are valuable



Major Gifts Committee Member Job Description

COMMITTEE PURPOSE

The Major Gifts Committee is designed to increase the number of individual major donors who may make a contribution of \$10,000 or more as either a one-time gift or a pledge over a period of time, typically up to 5 years, to the organization

To establish, maintain and strengthen the relationships with the top 25-100 donors and prospects. These prospects include individuals, businesses and foundation/granting organizations.

Additionally, the committee implements programs of:

- Appreciation
- Communication
- Stewardship
- Upgraded giving support

COMMITTEE MEMBERSHIP

The Major Gifts Committee is composed of 8-12 committee members. Entrepreneurs, business owners, retirees, leaders and professionals within the community who are already active in their community are all good committee members. Other qualities for committee members are outgoing, sincere and goal-oriented. Fans of the hospital and/or grateful family members are also strong members because of their knowledge and experience in the mission and willingness to advocate for it. A good committee is balanced across gender, age and other demographic and geographic needs.

Role of Committee Members

- Identify individual, business & organization prospects capable of making a gift of \$10,000 or more payable up to 5 years
- Help determine prospect key interests and match those interests with the organization's needs and plans
- Act as a focus group – determining best timing, approaches and activities
- Cultivate prospects through personal contact, luncheons, tours of the organization and special invitations to events.
- Assist in acquiring new donors at the major gifts level through opening doors and/or gift requests
- Assist with appreciation and personalized donor recognition activities
- Each top donor/prospect on the major gifts prospect list is personally connected with at least 1-2 times per year

Core Strategies

- Personal invitations to give
- Behind the scenes tours
- Personal thank you notes and/or calls
- Gift renewals/increase
- Recognition events
- Donor wall
- Annual report
- Invites to special events

Meetings

- On average 5 committee meetings per year – January, March, May, September & November
- Occasionally, a full foundation volunteer meeting every several years, usually when kicking off a new project or program

Terms of Service

- The Foundation committees do not have official terms. We invite volunteers to participate for as long as they feel this is good use of their time and they are having fun as a part of the group

Other Expectations

- It is anticipated committee members attend meetings as well as programs or special events sponsored by the Foundation or the Major Gifts Committee
- A personal financial commitment at a level meaningful to the committee member at or above the major gifts giving club of \$10,000 payable up to 10 years
- The Foundation truly appreciates volunteer involvement of time, talent, treasure & ties. We also believe your support as an ambassador in the community is priceless. Each meeting starts with ___org name___ News to keep you “in the know” as well as e-mail alerts with the latest news.

Philanthropy Truisms



01

Giving is a habit

02

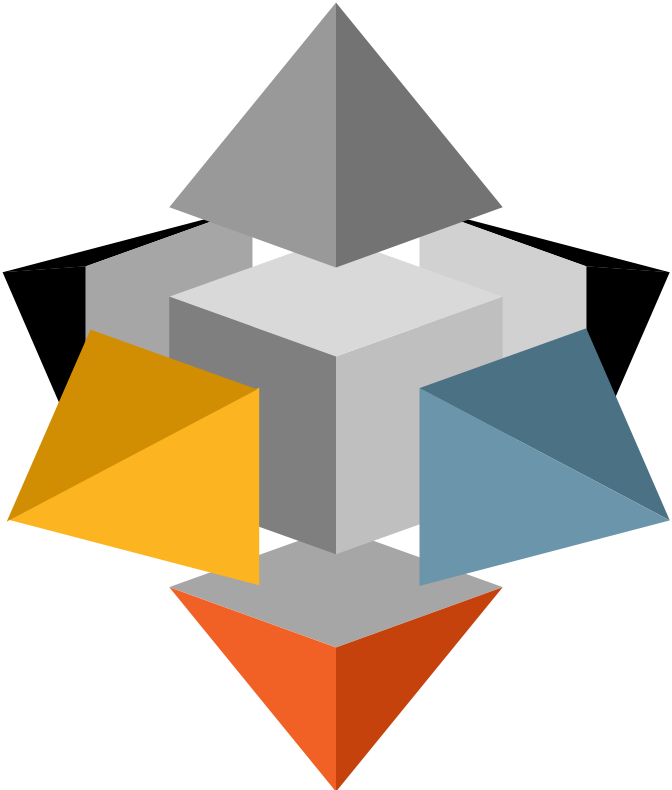
**People give to
people *with* causes**

03

**People don't give to
solve organizational
needs**

- A sense of vision
- Excellence
- The future
- Impact

Philanthropy Facts



01 | Approximately 80% of gifts come from individuals

02 | 80-90% of philanthropy is from major gifts

03 | Major giving has 4x greater return than events

04 | Most planned gifts come from loyal annual donors

Getting Started

Defining Your Case for Support



01

**What is the
community need?**

02

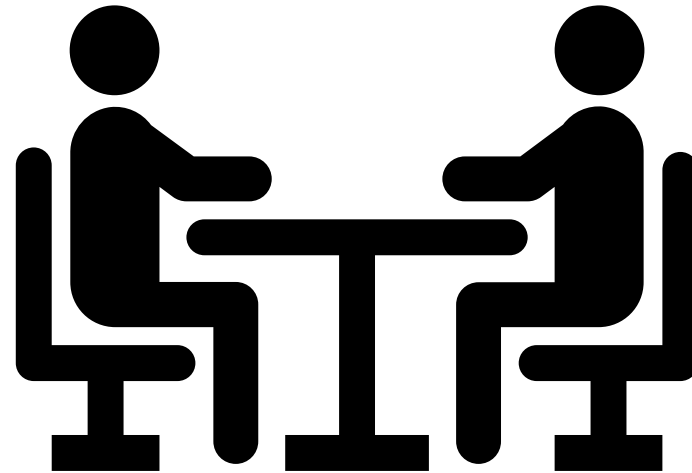
**What is your
organization's
response to the need**

03

**What role can
the community play
to make it possible?**

Tell Your Story

What's your personal story as a volunteer?



The Donor Process

Yes, it is a process



Identification – The 4 C's

The best prospects have...



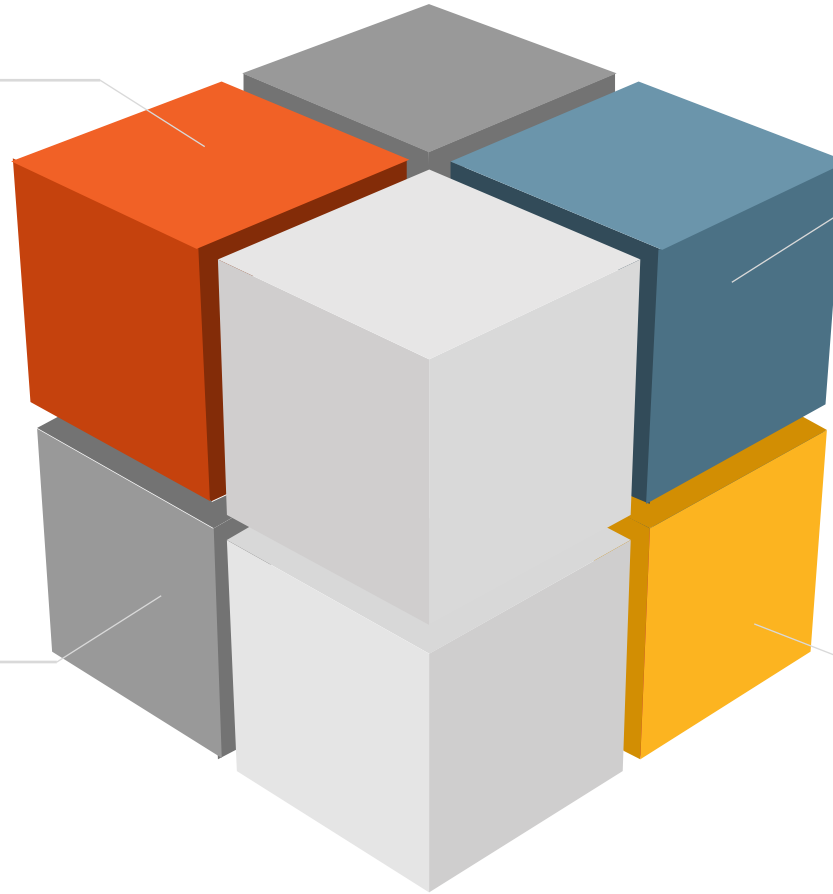
Capacity

Possess the resources to make the gift



Charitable Giving

Have a known history of local philanthropy



Care

An inclination to give money to you, history of involvement or giving to you, come specific interest in your mission



Connection

Known relationship with someone in your organization who can open a door and has trust



Prospect Qualification

Top 25 Focus



A Prospect

Past large donor who knows us

B Prospect

Know us, but have not given or made a small gift

C Prospect

Have capacity, but don't know us or have a connection

Meet to discuss project & naming opportunities

Determine next cultivation step:

- Casual conversation
- Breakfast/lunch/dinner
- Tour
- Invite to special events
- Small group social

Hold for now, approach all A & B first

Gift Request Prep

Making an individualized plan

- ✦ Who's the best contact?
 - Influence of the contact
 - Peer to peer

- ✦ Team approach

- ✦ Research the prospect

- ✦ Best time and place

- ✦ Determine \$ amount/request

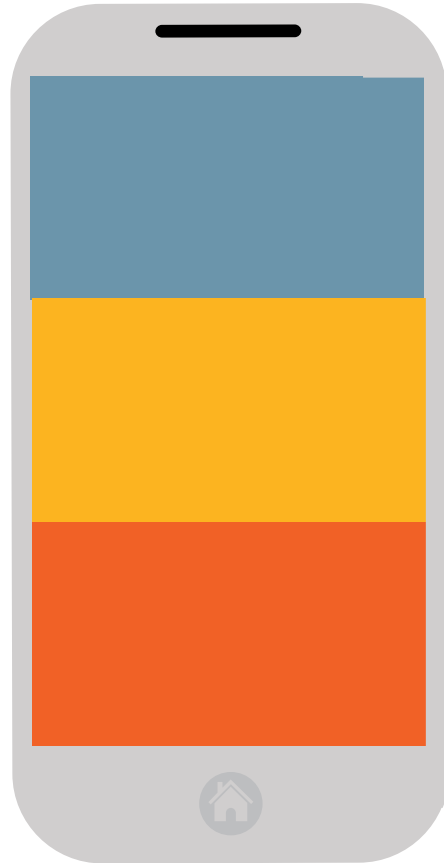
- ✦ Prepare materials

- ✦ Make your own gift



Scripts

Calling to set up a visit



- I'm working with _____ and feel supporting our organization is important because...
- The reason I have chosen to support our local _____ is...
- We have some really exciting things happening at _____, would you be willing to visit with me to learn more?
- Determine date, time, location

Rehearse! Rehearse! Rehearse!

Making an individualized plan

- ✧ Who initiates the conversation?
- ✧ Who provides the background on the organization?
- ✧ Who describes the specific project/program?
- ✧ Who asks for the gift?
- ✧ Who handles objections?
- ✧ Who (and when) presents the printed materials?
- ✧ Who closes?



Don't Forget to LISTEN

Active listening is key

 To connect in meaningful ways

 Enable you to work better with donors and have more accurate info re:

- Donor's giving motivations
- Donor's intentions in helping
- Donor's expectations of the exchange

 Instills TRUST

 Establish meaningful rapport and future access



Other Top Tips

Gift request techniques

- ✦ Be sincere, genuine and passionate
- ✦ Engage the prospect
 - Ask for money, get advice
 - Ask for advice, get money
- ✦ People give to people *with* causes
- ✦ Relationships first!
- ✦ Use your knowledge to tailor the request
- ✦ Have a strategy



More Top Tips

Gift request techniques

- ✦ Let them offer help
- ✦ Don't get hung up on the gift request \$ amount
- ✦ Don't feel like or act like a beggar
 - Raffle ticket vs. meaningful conversation
- ✦ Don't assume you get a "no" before you even get one
- ✦ If you get a "no," is it a no, not ever?
- ✦ Follow up after the visit



The Meeting

Making the personal gift request

Establish rapport



Discuss the project



Discuss philanthropy need



Explain importance to you



Make the request



- Would you join me in supporting...?
- Specific amount
- Naming opportunity
- Giving club
- Pledge time frames

TOP 10 “Making the Ask” Phrases

- ✦ Not many in our community can make an impact like you can...
- ✦ I have something you are not going to want to say no to....
- ✦ We’d love to have you join us in our project to....
- ✦ Please join me in supporting.... (you’ve made a personal gift to the project yourself)
- ✦ I would like to invite you to make a gift in support of our _____ project



TOP 10 “Making the Ask” Phrases

- ❖ Asking for a gift is not easy for me, but I feel so passionately about _____ that I’m coming to you to help us _____
- ❖ I know that you’ve been very generous with your time and support for important things in our community, would you please consider making _____ one of your priorities with a gift of \$ _____ to impact _____
- ❖ We are approaching the finish line for our goal and would be incredibly grateful to have your support to ensure our success
- ❖ Your gift of \$ _____ will make extraordinary things possible like...
- ❖ Thank you so much for being a part of a number of other critical projects throughout the last several years....we are excited to tell you now about _____ and hope you will consider continuing your legacy of generosity with a gift of \$ _____ to _____



The Meeting

After the request is made

After you ask...

Be quiet

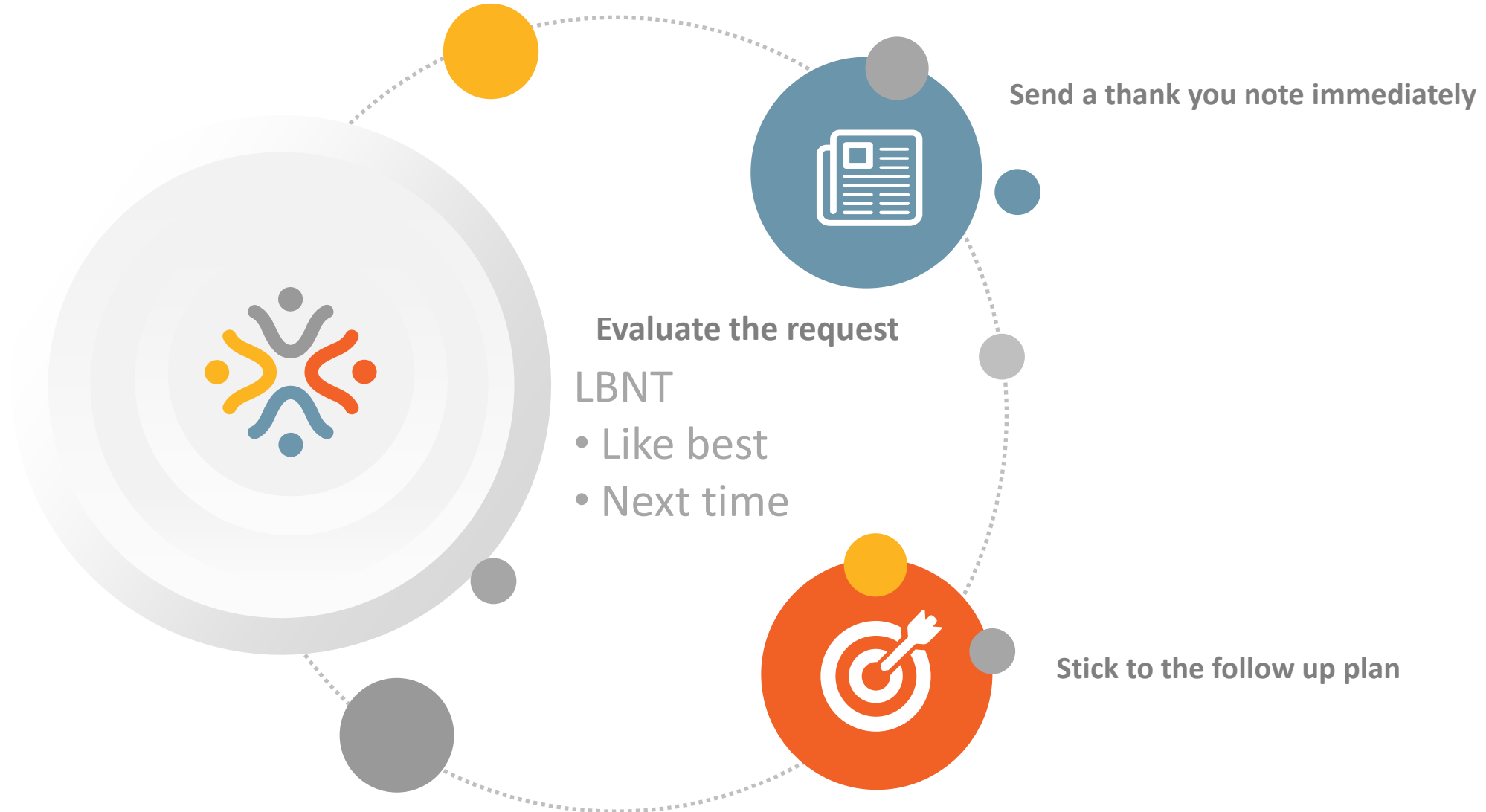
Listen to questions or concerns

Specific follow up plan

Thank you

After the Meeting

Evaluate & follow up





CELEBRATE YOUR SUCCESS!

4 Focus Areas



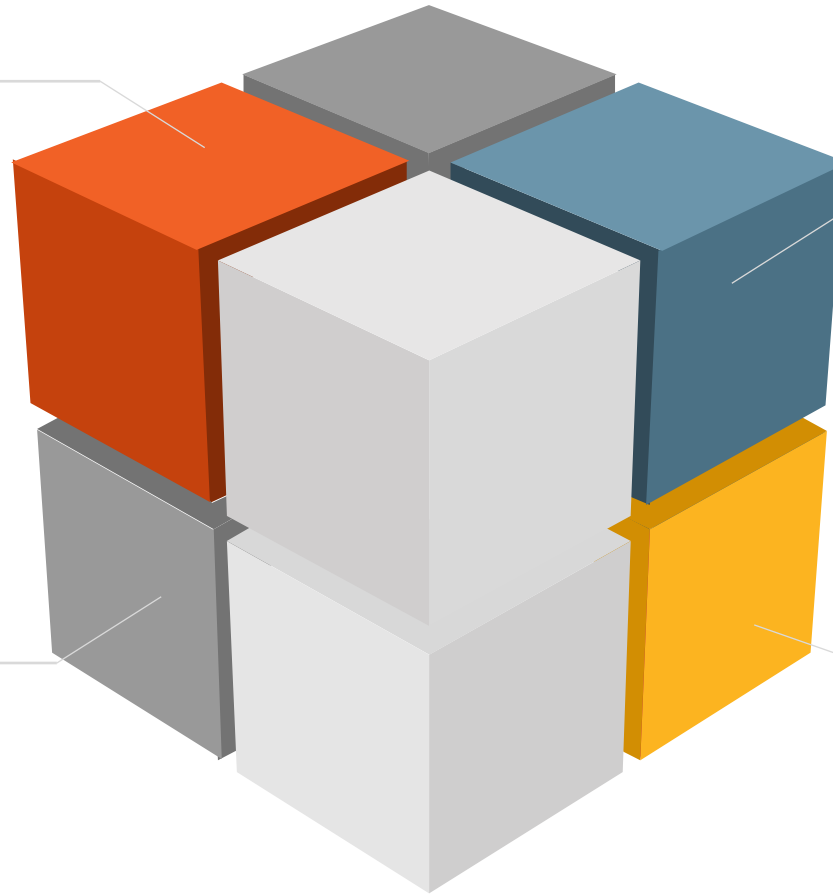
Educate

Keep community
leaders in the know



Invite

Invite others to get
involved



Thank

Special stewardship and
recognition for support



Fun!

Let's be creative,
thoughtful, inspirational
and have a little fun
along the way



HILLARY LYONS ASSOCIATES

Thank You

for the opportunity to partner to advance your mission



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