

Readiness for major gifts solicitation...a few tiny tips to get you into the spirit of the thing. Then read and study!

Defining terms and rationale

What is readiness?

- In summary: Capacity (resources) and capability (skills, knowledge, competencies)
- Fundamental understandings – Avoid naivete!
- Willingness
- And some very specific topic areas – more later...

What exactly is major gifts solicitation?

- Me, Simone, meeting with my colleague Adrian – whom I've known for a number of years and continue to get to know better – and asking him to consider a particular gift.
- In fundraising, we sometimes say: The right person asking the right person for the right thing at the right amount at the right time.

What is a major gift?

- The donor decides!
- What does your organization decide? Where to invest its resources of time, people, money, etc.

Warning #1: So while a major gift for me might be \$1000. For Bill and Melinda, it's more than that. And I might expect personal face-to-face solicitation for my gift. But your NGO doesn't think I'm worth the time. Okay.

How does an NGO use a major gifts program?

- To support general operations/core program – NOT just for capital and other special projects.
- What I want you to aspire to: SPJ and Trinity Rep

What is the rationale to justify launching a personal face-to-face major gifts program?

- Best Return on Investment (ROI) in fundraising: Least expensive and most productive financially
- Great relationship-building opportunity
- Opportunity to create an extraordinary experience with / for the donor

Exploring readiness

Key areas of readiness:

- The organization: All of it + the development operation
- The executive director/CEO
- The board
- The individual board members
- The prospect / donor ...to be asked

Imagine various criteria to measure readiness. Both hard and soft measures. Here goes:

Warning #2: Not all organizations have a development function. Smaller organizations may use the Executive Director as the development leader.

Readiness of the organization (and its development operation – whether that’s a separate function or is the responsibility of the ED because there are is no separate function)

- Capacities (resources) & capabilities (knowledge, skills, and competencies) required
1. Culture and operations
 - a. Customer-centered/donor-centered behaviors at all levels of the institution
 - b. Culture of philanthropy and recognition of philanthropy’s essential partner, fundraising.
 - c. Organizational commitment (e.g., capacity and capability) to carry out a qualify fundraising program
 - d. Organizational commitment to implement an effective major gifts program.
 2. Appropriate policies in place (All this should already be in place if you’re doing any kind of fundraising at all. But even more so in major gifts because of the bad things that can arise.)
 - a. Types of gifts you will (and won’t) accept.
 - b. Boundaries between donors and the organization – control of gift use and donor input
 - c. Recognition
 3. Case for support
 - a. Real-life stories with the donor as the hero
 - b. Meaningful response to such questions as:
 - i. Why does this organization/cause matter? Who cares? Why would it matter if this NGO went out of business?

- ii. Why now? How will donor gifts make a difference and why does that matter?
 - iii. Why me, this prospective donor? How would giving through this NGO fulfill my aspirations and carry out my values?
- 4. Information and its management / analysis, e.g., database, etc. (Direct link to #5)
 - a. Sufficient information to determine who are the qualified prospects
 - b. If current donors, gift history within your organization
 - c. Nature of the relationships with your organization
 - d. And soooooo much more.....
- 5. Qualified prospects/donors: People who are willing to be asked
 - a. Effective identification and segmentation by interests, solicitation strategy, etc.
- 6. Willing and passionate solicitors:
 - a. People who tell stories well and listen well and understand the nature of conversion.
 - b. People who are willing to ask for a gift.
- 7. Professional leadership (staff – with consultant help, as necessary) to enable all this to happen
 - a. The “right” attitude and behavior: Continual pursuit lifelong learning.
 - b. The “right” knowledge: That’s why you’re taking this course.
 - c. Train board members to solicit – and enable their work throughout the process.

Warning #3: Without laying the right groundwork for fund development in general, you make personal face-to-face solicitation even harder for board members. Less-than-good fundraising and fundraisers have generated some lousy myths and practices that scare volunteers. Let’s stop it now!

- 8. Role of the board – as distinguished from the individual board member.
 - a. Endorse the concept and help staff determine measures and monitor progress (dashboards, etc.)
 - b. Establish the expectation (performance requirement) that board members must help with relationship building and fundraising – and enforce the expectation with each individual board member.
 - c. Acknowledge that there is a body of knowledge, research, etc. – and accept the professional leadership of professional fundraisers.
 - d. Expect application of the knowledge base/research.
 - e. Be ready to invest – as an institution, in the budget – in the fundraising function.
- 9. Role of the individual board member – as distinguished from the board as a group.
 - a. Give an annual personal contribution to the best of personal ability (what the board member considers a major gift), treating the NGO as one of one’s top 2 or so philanthropic commitments.
 - b. Give a separate contribution to a board-adopted special campaign requiring major gifts.

- c. Expect effective enabling by professionals about how to do the work expected.
- d. Find stories that resonate personally – and be prepared to share those in various settings.
- e. Apply listening and story-telling skills with others.
- f. And some board members **MUST** be willing to participate in major gifts solicitation.... As a storyteller/storylistener and/or as an asker for a particular gift.

In conclusion

Success tips

1. Storytelling and story listening
2. Conversations – not presentations – between people who care about an issue / a cause
3. Conversation means asking open-ended questions and listening and engaging.
4. Sharing stories. Sharing feelings.

Closing tips

- Don't make this a bigger deal than it is – hence avoiding doing it. Trite though this may sound: Just do it!
- Giving is not about money and not about your NGO.
- Giving is about fulfilling the prospect/donors aspirations.
- Understanding and embracing the broader principles and practice of fund development – and how major gifts solicitation fits in
- Choosing to do major gifts solicitation – no matter your budget size, whether or not you have a development staff, etc.
- Willingness to commit the resources to do it – No distraction...the opportunity cost is too great!

Now read and study and then do it!

Amy Eisenstein, *Major Gift Fundraising for Small Shops*

Laura Fredricks, *The Ask*

Andrea Kilhstedt, *Asking Styles*

And definitely read the research about major gifts fundraising for small shops Conducted at the Hartsook Centre for Sustainable Philanthropy at Plymouth University in the U.S. Just check on Amy's website, <http://www.amyeisenstein.com>.