**How to encourage major gifts**

*Don’t be afraid to ask.*

*The worst thing that can happen is that the person says no!*

**Introduction**

‘Major Donor Fundraising’ is a recognised specialism in the fundraising profession, but churches rarely think about it. Any PCC that is looking for large sums of money for capital projects will probably need to ask individuals for major donations. These donations may range from £500 to £5,000, or even £50,000, depending on the size of the gift, how much is needed and the ability of the individual to make such a gift.

The definition of a ‘major donor’ will vary. It probably doesn’t mean someone who is going to magic up £1 million. It all depends on your context. £1,000 for a small charity with a turnover of £12,000 per annum could be considered major, but for at the National Portrait Gallery that wouldn’t even get you near the top tier of ‘patron’. If someone gives, or is able to give, over and above a particular level, they can be considered a major donor.

The scope of this briefing is to explain the techniques of asking for large gifts, and what it takes to be successful. It assumes that you have already done the work of defining your vision for the project and planned it properly. For resources in planning your project click here <https://www.parishresources.org.uk/resources-for-treasurers/funding/funding-guides-capital-fundraising/> or here <https://www.ecclesiastical.com/church/fundraising/>

**Seven steps to encourage major gifts.**

1. **Identification of individuals**

A fund-raising committee will identify people in their church and/or community who may be prepared and able to give at a major level to the project.

1. **Evaluation of wealth**

An evaluation of a person’s past giving patterns to charities and their possible wealth will help you know how much to ask for. If someone cannot afford the amount you are seeking you may not get anything at all. If the amount asked for is too low, the project ‘loses money’ from this particular source.

1. **Making friends**

Research into personal contacts of the individual can create a link between the church and the individual. Such contacts may be part of the church family or their friends and contacts in the community who know the individual personally. Building relationships is key.

1. **Awareness:**

At this stage your aim is to get the prospective donor interested in your project, seeking help and advice and arousing enthusiasm with details and relevant information on the different aspects of the scheme.

1. **Asking for a donation:**

Ask the individual for the exact amount of money and/or help required by him/her for the project to succeed. Don’t leave them guessing. Tell them what you want in a clear and concise way.

1. **Thanks:**

This step should be obvious. These donations must be acknowledged and recognised for what they are and appropriate thanks given.

1. **Continuing support:**

This person has made a generous donation, which is crucial to the success of your project. Keep them in the picture throughout the development and life of the project; their help and presence may be needed in the future.

**The role of the fundraising committee**

You will need to set up a fundraising committee. The incumbent doesn’t have to be involved in everything, but there will be times when their input will be very helpful. In the light of the seven steps outlined in the previous section the committee needs to:

* Identify individuals who may be possible donors.
* Present a strong clear case for the project.
* Ask for what is wanted clearly and efficiently.
* Have the answers ready to meet objections.
* Become confident and secure about asking for money.

The people they are approaching need to feel they will be part of something special, outside themselves, something that will make a difference to people’s lives. It is important to remember to appeal to hearts as well as minds.

**How to Start**

Make a list of the key points of the project using the form on Appendix II (at the end of this briefing).

Understand **who** gives to whom, for example:

* + People give to people – without a relationship they are unlikely to support the project.
  + People give to their peers
  + People give to those they know personally (building relationships, again)

Understand **why** they give, for example:

* + Religious belief
  + Self-preservation
  + Guilt
  + Tax savings
  + Obligation
  + Recognition
  + Pressure

People’s motivations are complex, but if you understand you will be in a better position to build a relationship and enthuse them with your plans.

Understand **how** they give:

* + Individual gifts
  + Through Charitable Trusts
  + Through their companies
  + By leaving a legacy

Understand why they do **not** give:

* Poor research into their patterns of giving
* Inability to say why you need the money
* It was unclear how the rest of the money would be raised and where their gift was in the plan.
* They were not asked for a specific gift or range of gifts
* They were not offered a variety of ways of giving
* The person who asked them was not someone they would feel comfortable with
* Their spouse/partner was not involved
* The request was not followed up

People from your church probably won’t be comfortable asking for money. Understand their real **fears**. These are some of their reasons:

* + Rejection by the person concerned.
  + Embarrassment
  + Fear of failure
  + They may have to reciprocate and do the same for their friend in the future.

Counter fear with **knowledge.** People give for a reason, and object for a reason, so you can prepare answers to expected objections in advance. (See appendix III at the end of this briefing)

Understand the giver’s **needs.** What is your donor getting from this?:

* Having their own interests recognised
* Doing what is expected of them
* Enabling them to make a gift that is proportionate to their circumstances.
* Approbation of peer group
* Taking part in a successful venture
* Opportunity to give on their own terms

Monitor and **record**:

* + What Profile research have you done
  + Record all contacts made and by whom, together with the outcome
  + Keep records up to date

**The process**

**Preparing the Background**

Gather as much information about the prospective donor as you can from as many sources as you are able, eg:

* Internet searches
* Friends
* Acquaintances
* Local papers
* Annual reports of their businesses (https://www.gov.uk/government/organisations/companies-house)
* Social media, particularly LinkedIn

You need information on:

* + Their level of lifestyle, to assess the level of gift to request
  + Their interests and hobbies
  + Which good causes in their community they have supported in the past, which will help understand whether they might be interested in your project
  + The charity policy of their business, if appropriate

When you have created a profile of your donor, match your project to their particular interests and highlight what will appeal most.

Decide exactly what you are going to ask them to do. Would you like them to:

* + Give a donation of £xxx
  + Help to raise funds from their contacts
  + Open doors for you to other individuals who could help your cause.
  + Pay for a specific part of the project. For example, repair a window or furnish a room
  + Any combination of the above
  + Something else

**Preparing to meet with your prospective donor**

You will meet with your prospective donor to explain what your project is, any why you want their support. Think about where you would like the meeting to take place. In the church itself may be right if the appeal is for fabric. If you are wanting to fund a social action project, the meeting might include an encounter with the people the project is hoping to help.

This meeting has four distinct parts

* + Opening
  + Presentation of the project
  + Objections and dealing with them
  + Closing

***Opening:*** Introductions and reasons why you have asked to see them.

**Presentation of the Project*:*** This is the most important part. If you have prepared properly you will have developed a strong case for support. Write it down and rewrite until it flows easily, writing it as you will speak it. Record it, listen to your recording and then edit it again and again until you are sure it is clear, concise and as convincing as you can make it. Rehearse again and again until you are fluent. You might also consider videoing yourself.

**Asking for the Gift:**Always acknowledge any previous gift from the donor and state that you hope the donor will be able to help this exceptional appeal. Tell them who has already given from within the community and what has been received from major trusts etc. State the amount of the gift you are asking for and/or a range of options for them to consider.

Helpful phrases in asking are:

“Given your previous interest/support for....”

“I was hoping that you would join us and help us in reaching our urgent goal of raising substantial money for....”

“ Would you be able to consider a major gift in the range of ......? This could, of course, be spread over .... years.”

**Be silent.**

**Wait for their reaction.**

**HOWEVER LONG IT TAKES**

**Objections and how to deal with them:**List the objections to your particular project on Appendix III and find the best responses. Have the answers to these general observations ready.

* + Goal is too high
  + Always being asked
  + Government should fund
  + Duplication of others effort
  + Bottomless pit
  + Ask someone else, not me
  + Recession

Always acknowledge objections but do not debate them. Correct any errors with the facts and get back to the subject and common ground between you.

**Closing:** This stage is to enable you to know when the donor is ready to make a final decision to say yes. So, use a phrase such as: *‘We’ve said our piece; can you think of a reason why you cannot help?’*

Deal with any further objections and clear them out of the way. Then try another closing phrase such as: ‘*This is our one great chance to....... It really is now or never.’*

Clear up any more objections raised and try again: ‘*As a key person in this community your help is absolutely crucial.*

When all objections and/or questions have been answered, the person will finally come to a decision and state it.

**Once again be silent, give them time to come to a decision.**

Your task is to make the right things happen once you have asked for the gift.

***So:***

Listen - Actively

Interpret - Accurately

Respond - Appropriately

**At the Interview:** If two people make the visit then act as a team. One person should be ‘staff’, ie Incumbent, Churchwarden or Chairman, and the other should be ‘volunteer’, ie friend, acquaintance or other. Each person has separate roles so follow the chart below:

|  | **Staff** | **Volunteer** |
| --- | --- | --- |
| Who leads: |  | X |
| Who sets the tone: | X |  |
| Who describes: |  | X |
| Who asks: |  | X |
| Who reinforces: | X |  |
| Who closes: |  | X |

Write up anything you have agreed with your donor as a record of your request.

**Follow up:** After the visit send a short letter or email that includes:

* + Thanks for taking the time to see us.
  + The hope that the gift can be made by a particular date.
  + An offer to answer further questions.
  + Stress the deadline for the completion of theproject.
  + Remind the donor of urgency.

Asking for money is never easy but it can be a less daunting task if you remember the following:

* + Be good listeners as well as speakers.
  + Be your own charming selves.
  + Ask for a gift at a particular stage and ask for enough.
  + Always stay positive.
  + Know who you are talking to.
  + Tailor your presentation to their interests.
  + Think about objections beforehand and prepare the answers.
  + Leave a written proposal.
  + Use the techniques here to reduce your fear of asking for money.

Most people who are in a position to give generous donations will want to help you, if you can make a case for support. These techniques are to enable you to let them help you by understanding the needs of your cause in the best way.

*Appendix I*

**Fears about asking people for money, and why you can do it anyway**

**Fear The Answer**

“I hate to ask for money” People don’t mind being asked. They may even expect it.

“I am afraid to ask” People give because they’re asked.

“Asking is demanding Ask with a question.

something from someone”

“I am afraid they will say no” Ask and you may receive. Don’t and you won’t.

I feel really uncomfortable in Not asking deprives the people

asking. It is stressful to do you are trying to help.

this - especially approaching

people I know.

*Appendix II*

**Key points of your case**

Using strong phrases list the most important points and then put them in order from the most important to the least important:

1.

2.

3.

4.

5.

6.

7

8.

9.

10.

**Inventory of objections**

List the most likely objections to supporting the project that you can think of:

1. 5.

2. 6.

3. 7.

4. 8.

List the best responses you can think of:

1. 5.

2. 6.

3. 7.

4. 8.

**Further information**

From the Chartered Institute of Fundraising: <https://ciof.org.uk/events-and-training/resources/major-donor-fundraising>

Ruth Irwin, Major Gifts Unwrapped: 39 Principles for the Successful Major Donor Fundraiser, ISBN-13:‎ 978-1999906207