

**Major Gift Solicitation
Process, Visit, Question**

By TPG Philanthropy Group

The Process

1. Make your pledge/contribution first. With rare exception, your pledge should be greater than or equal to the amount asked of the prospect you are soliciting – one exception is equal commitment not equal gifts.
2. Make your plan to contact your prospects. Write and/or call prospect for a personal appointment. You are doing good work . . . not begging. Do not get into project discussion over the telephone.
3. Know the facts and your Case-for-Support.
4. Make your calls – work in pairs. Often two to five visits will be necessary to achieve a major gift commitment, be prepared, and plan accordingly.
5. Return your prospect profile cards and pledges to the office immediately.
6. Attend the recognition event(s).

The Prospect Visit

Teams of two are much more effective than one to one solicitations. Also use door openers, endorsements, or “leverage” from others to assist you before and after the visit.

Amicable Opening: (1 to 3 Minutes) Ask about the prospects **F**amily, **O**ccupation, **R**ecreation, and/or **M**oney interests – **FORM**.

- Warm up with sincere compliment about something personal.
- Get person talking about himself/herself.
- Sincerely engage and encourage the prospect.
- Note prospect interests that link with your case-for-support, mission, and vision.



TPG COMPANIES

Persuasion: Share why or how you became involved in and committed to the cause. (1 to 2 Minutes)

Present your personal overview of the Case. (3 to 5 Minutes)

- History - the need / opportunity
- What current projects are underway and their benefits: Today
- Where organization wants to go - proposed solutions: Tomorrow
- What it will cost to get there: \$\$\$\$

Ask for the Order: (2-5 Minutes)

- Acknowledge prior level of giving to organization.
- Express hope.
- Mention names of peers and their connection to the project.
- State gift/pledge range.
- Be silent. Use silence to get a reaction. “The one who talks first ‘loses’.”
- Leave or send as follow-up a written proposal as a record of the request.
- Key words and phrases:

OPTION I

“(Name), we would like to ask you to help us in three ways: First, we would like you to lend your name to the campaign. People respect your judgment. By including your name in our leadership group, our campaign gains credibility.”

Second, we would like to ask you to help open five doors to people at your peer level. We know that people will respond to our message IF we can get to see them face to face. That is where we need your help.

And finally, we know we have no way of knowing what you might be capable of giving, but we would like to ask you to consider a leadership gift of \$XX,XXX per year (or monthly amount) for each of the next five years, a total gift of \$XXX,XXX. Does this sound like something you can do to help us?”

OPTION II

“Given your (leadership, influence, reputation, demonstrated/new interest in) (project, mission, organization, community), I hope you will join with me and (mention names of peers at the same giving level) to meet the \$1.2 M goal. We would be most grateful if you can consider a (commitment, pledge, investment, major gift . . . avoid the word “contribution” if you want significant support) of \$_____. Is that something you can consider?”



TPG COMPANIES

OR

It is my hope that you can consider a (commitment, pledge, investment, major gift) of \$_____, is that something you can consider?

Note: NEVER apologize for asking for a gift or leadership. Also, after you ask for the specific gift, be quiet. Let the prospect respond to your request, and then you can respond to the prospect's answer.

Address Objections: (Use Feel, Felt, Found approach). (0 to 5 Minutes)

- Restate the objection back to the prospect to affirm understanding.
- State: "I understand how you feel" (ONLY if you do). "I felt the same way" or "I know someone else who felt the same way."
- Transition phrase: "If that's the way you feel, then you will be interested in this organization / project because..."
- Use facts to defuse the objection.
- Return to the issue, the prospect's gift/pledge.
- Keep common ground with the prospect.
- Transfer objections into action now. Act now by giving...

Closing: (1-3 Minutes) – Key is to link the donor's own motivations with how their commitment will provide that to them. There are many closing techniques and methods including:

- Presume the pledge i.e. How should I fill out the pledge card?
- Share donor recognition/naming opportunities – in what way / level does prospect want to be recognized?
- The NO/YES close for people who like to say no. For example: "Mr. Prospect, can you think of any reason why you should not make this major gift?"

Promise specific follow-up: (as much as it takes)

- Do it. The more immediate, personal, and persistent your follow up, the less time it will take you to successfully complete your prospect calls.



Common Questions Prospects Might Ask

“When I am employed in serving others, I do not look upon myself as conferring favors but in paying debts.” - Benjamin Franklin (1706-1790)

1. Why is your organization the right organization to address this issue/opportunity?
2. Why is now the right time for this \$ _____ campaign?

Response: Ask questions to affirm if their question is about amount, the project schedule, or the calendar timeframe . . . and address accordingly.

3. How will this campaign help achieve the mission? What objectives are being met? Who benefits and how?
4. How was the target determined? For example, how will the money be used?
5. What if the goal is exceeded?

Response: You could address the need to continue to fundraise beyond the \$ _____ needed for _____.

6. Will you be asking me to give every year?

Response: Answer can include an indication of the need for this level of support from key donors for the next several years and request if the prospect would prefer to make a multiple year pledge.

7. Why am I being asked for this amount? Who decided to ask me for this much?

Response: When asked by a prospective donor how much s/he should give, the confident reply is, "Give until you are proud" Paul Ireland (1914-1987). Another way to respond can be phrased "it is my hope that you can do what I did, and make a pledge larger than you originally think may be possible." OR another response option "groups of leaders met to confidentially identify what each prospect might be able to consider in support of this campaign. This amount is a consensus of individual recommendations of these leaders. It is our hope that you can consider a gift/pledge in this range."



TPG COMPANIES

8. I need to visit with my spouse, (family, business partners, etc) and then get back to you, OK?

Response: "Let's select a time for me to visit with you again that is also convenient to you and your spouse (family, business partner, etc)." Also ask if possible: "What particular interests and/or concerns might he/she have about the project? I strive to be as prepared as possible."

9. I cannot give that much because . . .

Response: Offer pledge payment alternatives, i.e. deferred first payment etc. Indicate opportunity is available to give assets other than current income i.e. stocks, bonds, deferred and planned gift arrangements, etc. Match specific suggestions to the "because...." statement. Ask to bring the appropriate representative to return with you for a follow up discussion.

10. What happens to the money or project if the goal is not raised? Will I get my money back?

Response: You can include the fact that seed money is risk capital that will be spent to best ability in attempt to make the project a reality. Unlikely any money to return. If need be, the donor may wish to make a commitment with contingency. (The board may not be able to accept the contingent commitment in good faith). Try to avoid contingency; secondarily offer to present it to board for consideration. The clearer the donor's objectives or concerns are understood the more likely a mutually agreeable solution can be reached.