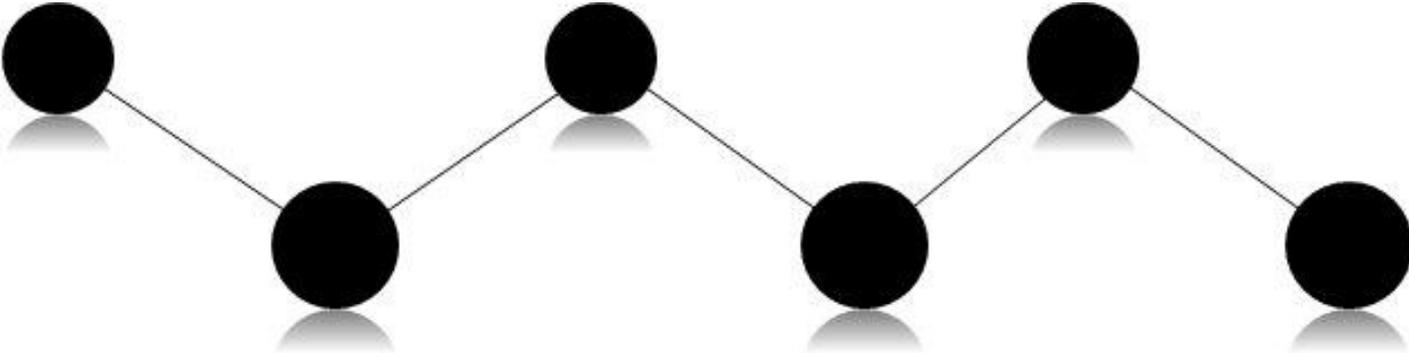


Getting to Gift Conversations and Closing



Larry G. Raff MPH
Copley Raff Inc.
2021





Terrified

1



Apprehensive

2



Suspicious

3



Ambivalent

4



Sassy

5



Game

6

How are you feeling today?

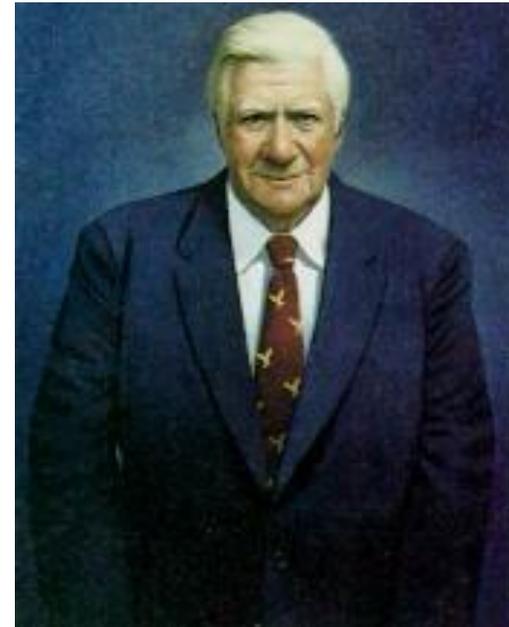
Today's Takeaways

1. Building your donor pipeline and portfolio
2. Using your case for philanthropic support
3. Selecting the right ask team
4. Getting the meeting and transitioning to the gift conversation
5. Being prepared and fearless
6. Active listening
7. Closing the gift



Truism 1

Make friends BEFORE you need them.



Congressman Tip O'Neill

Truism 2

Your chances of getting a gift are much better if you ask for it than if you don't ask.

Larry G. Raff



Dogs always ask for what they want.

We Are All Philanthropists



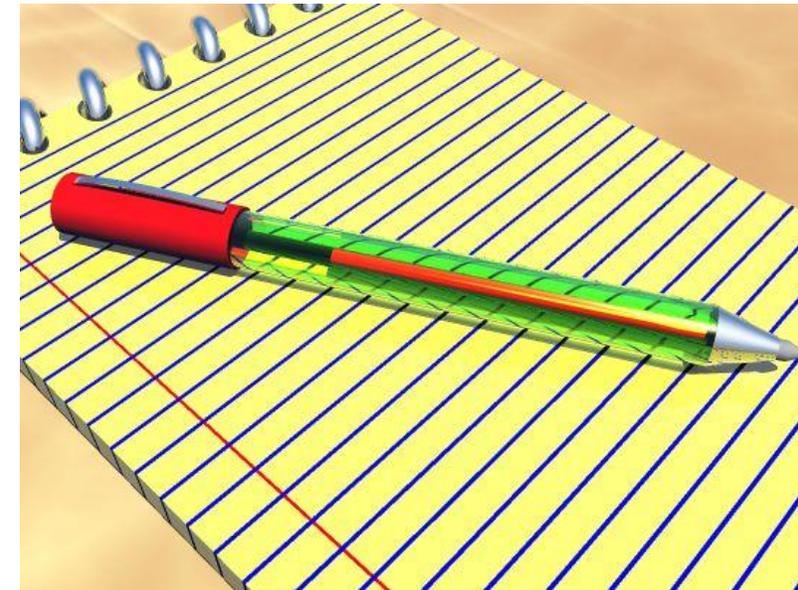
Donor Pipeline Development



Key behavior metrics/characteristics include:

1. Loyal donors / many gifts
2. Total giving
3. High average gift
4. High one-time gift
5. Researched capacity
6. Philanthropic behavior - giving to other organizations
7. Large political donor
8. Known to believe in mission

Building Screening List



Relationship Screening

Rapidly go through list, indicate relationship level (SEE KEY BELOW) and add names.
You will be under no obligation to be involved with any solicitation of the people you know.

YOUR NAME HERE _____						NOTES
ALYSSA ADAMS SOUTHBOROUGH	1	2	3	4	5	
JASON ADAMSON JR HOLLISTON	1	2	3	4	5	
DENNIS ALOISE-GRAF UXBRIDGE	1	2	3	4	5	
DAWN ANDERSON /Alan	1	2	3	4	5	
RUSSELL ANDERSON FRANKLIN	1	2	3	4	5	
MARY ANSELL	1	2	3	4	5	
WAYNE ARTHUR HOPKINTON	1	2	3	4	5	
JOHN BANNISTER MEDFIELD	1	2	3	4	5	
BARBARA BARON	1	2	3	4	5	

- 1=willing to write note on invitation
 - 2=willing to invite to lunch
 - 3=willing to invite to dinner with CEO
 - 4=recommend for greater campaign involvement
 - 5=interview for study
- CIRCLE ALL THAT APPLY

Building Relationship Map

First Name	MI	Last Name	City	BERN	Mike S	Arthur M	Cosmo A	Leo H	Lynn P	Rob M	Traci M	Danielle C	Michele B
Cindy & Robert		Citrone	Southport					34					
James		Lane	Wilton	4	4								
Willie		Brasser	Westport	3	3								
Don	H	Callahan	Fairfield		45								
Steve		Jakab	Bridgeport	2				25					
Gregory	S	Oneglia	Torrington							2			2
Phil		Palmieri	Fairfield	4									
Dana		Beecher	Danbury									3	
Andrew	M	Boas	Westport	2					1				
Eugene		Buckley	Trumbull					35					
James	A	Carbone	Bridgeport							3			
Julia		DeMeo	Fairfield	3									
Nancy	A D	Hancock	Easton							34			

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 CIRCLE ALL THAT APPLY

Relationship Map

<p>Mark K xxx</p> <p>Kitty Hawk</p>	<p>Sandy Martin 3</p> <p>Richard Bruce 1</p>
<p>Robert xxx</p> <p>Kitty Hawk</p>	<p>Marie Neilson 4</p> <p>Sandy Martin 3</p> <p>Richard Bruce 1</p> <p>Tess Judge 4</p>
<p>Dr. Sue xxx</p>	<p>Marie Neilson 34</p> <p>Richard Bruce 1</p> <p>Tim Cafferty 1</p> <p>Tess Judge 5</p>
<p>Matthew xxx</p> <p>Kitty Hawk</p>	<p>Marie Neilson 34</p> <p>Richard Bruce 1</p>

1=willing to write note on invitation
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 CIRCLE ALL THAT APPLY



Donor Relationship Management

Portfolio

GIFT OFFICER	VOLUNTEER WITH RELATIONSHIP	ENGAGEMENT OBJECTIVE / INTEREST AREA	GIFT GOAL	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
DONOR CANDIDATE 1	Mike Stein	Elementary students	\$ 10,000	Discovery move	Follow-up move	Discuss gift	Close gift
DONOR CANDIDATE 2	George Herr	Financial Literacy	\$ 10,000	Discovery move	Follow-up move	Discuss gift	Close gift
DONOR CANDIDATE 3	Lynn Pade	Beyond Classroom	\$ 5,000	Discovery move	Follow-up move	Discuss gift	Close gift
DONOR CANDIDATE 4	Tina Fora	High school students	\$ 250,000	Discovery move	Follow-up move	Discuss gift	Close gift

ON DECK

	RELATIONSHIP / MOVES MANAGER	RELATIONSHIP OBJECTIVE	FEB	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER
ON DECK										
Prospect #1		Keep informed	Bonding Call		eMail		Newsletter			Mail
Prospect #2		Keep informed	Bonding Call		eMail		Newsletter			Mail
Prospect #3		Keep informed	Bonding Call		eMail		Newsletter			Mail
Prospect #4		Keep informed	Bonding Call		eMail		Newsletter			Mail
Prospect #5		Keep informed	Bonding Call		eMail		Newsletter			Mail
Prospect #6		Keep informed	Bonding Call		eMail		Newsletter			Mail
Prospect #7		Keep informed	Bonding Call		eMail		Newsletter			Mail

Key

Strategy successful

Progress made

Strategy not successful or delayed

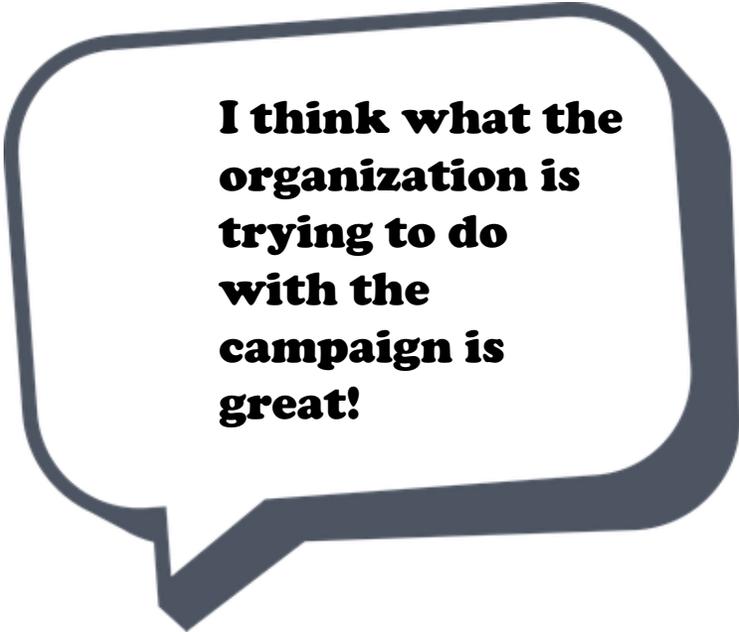
When to Ask



When is the Donor Ready to be Asked

1. What has the person said? What *haven't they* said?
 - *Donor conversations leave CLUES.*
 - *Listen for “giving” sounds.*
 - *Remember key statements that were said to revisit.*
2. How easy or difficult has it been to reach them during cultivation?

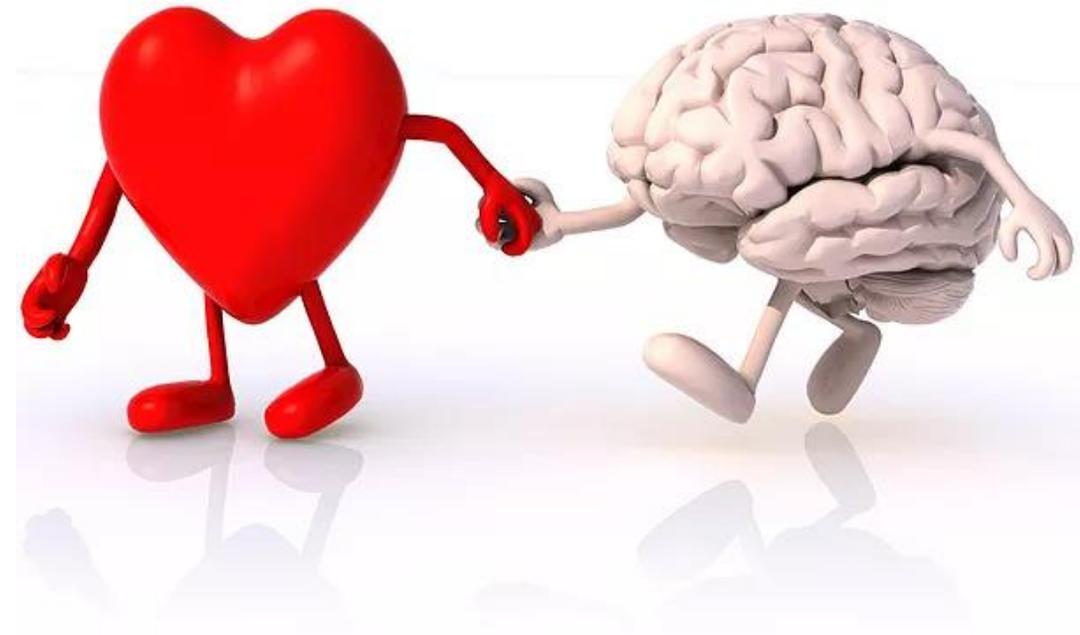
If the person was hard to reach during cultivation, they are going to be hard to reach during and after the Ask.
3. Does the volunteer facilitator have insights?
4. Does the person's giving patterns determine the time to ask?
5. Are they tech-savvy? Will they do video meetings?



I think what the organization is trying to do with the campaign is great!

Ask Conditions

Education
+
Involvement
+
Cultivation
+
Inclination
(giving sounds)
+
Emotional Connection
+
Assets
(types)
=
The RIGHT Time to Ask



Case for Philanthropic Support

Case for Investment

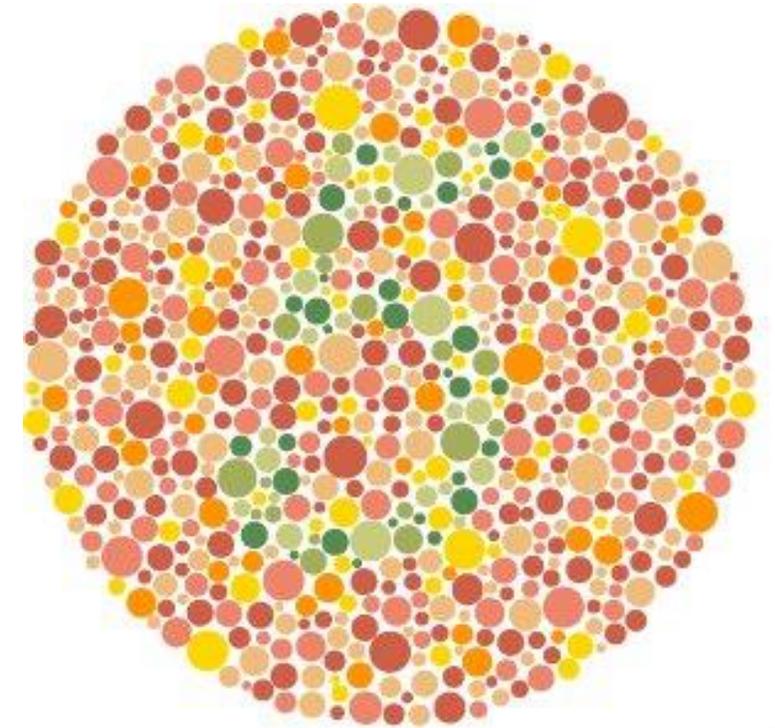
1. Value proposition
2. Urgent
3. Compelling argument
4. Who benefits
5. Cause and Effect
6. Why your organization
7. Customize for each constituency

- Annual Giving
- Major Giving
- Campaign
- Planned Giving
- Endowment Giving



Test Your Case

1. Do your own feasibility study.
2. Visit with associates, donors, important stakeholders.
3. Ask them to help you and react to the case statement.
4. Tell them you will not be asking for a gift ... yet.
5. Report back to advancement leadership with your feedback.



Miami Cancer Institute



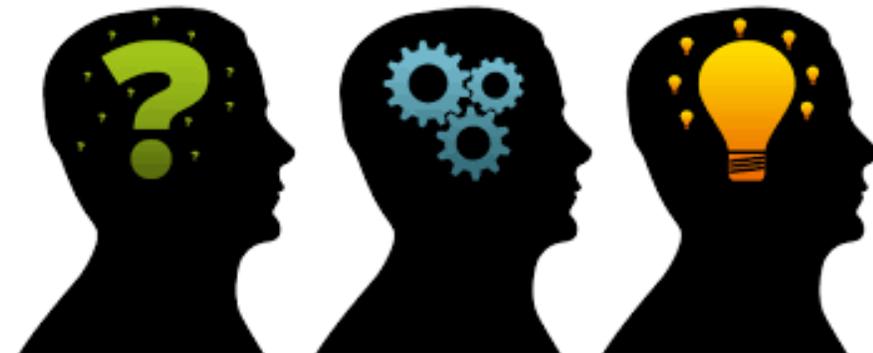
MCI Campus and Cancer Institute Pavilion	\$150,000,000
Miami Cancer Institute Pavilion	\$50,000,000
Research Building and Programs	\$30,000,000
Proton Therapy Building and Program	\$25,000,000
Breast Cancer Program	\$15,000,000
Clinical Research Program	\$15,000,000
Patient Parking Structure	\$15,000,000
Pediatric Cancer Program	\$15,000,000
Bridge to Baptist Hospital	\$10,000,000

Legacy Recognition Opportunities



Learn the Case(s)

1. Hold series of presentations on each aspect of the case. Dig into the detail.
2. Follow with a discussion so trustees, volunteers and staff can put what they have learned into their own words.
3. Ask trustees to write down the top take-away points they have learned at each session, and to share them with the group.



Preparation

*Give me six hours to chop down a tree
and I will spend the first four
sharpening the axe.*

– Abraham Lincoln



Preparation

*Luck is a matter of preparation
meeting opportunity.*

– Oprah Winfrey

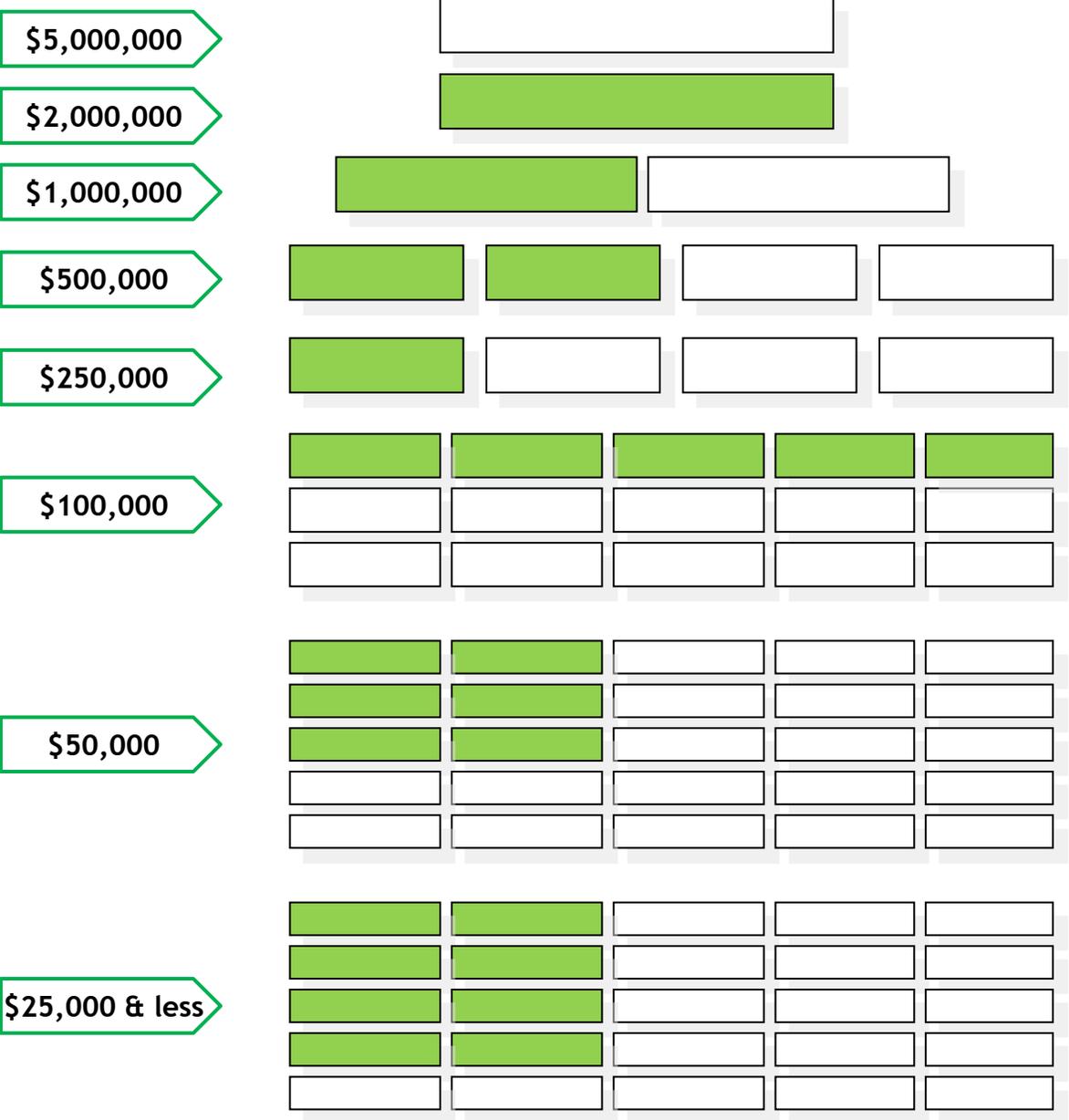


Ask Meeting Preparation

1. Profile on the donor candidate, based on research, contact notes. ([Handout](#))
2. Have an agreed upon ask amount.
3. Ask team selected and briefed on their role in the profile, and who is making the ask.
4. Gift chart.
5. Gift Intention form with addressed envelope. (send if virtual meeting)



\$15M Gift Plan



Green boxes represent secured gifts.

How Much to Ask

Age (male):	55
Age (female):	55
Retired:	NO
Total given to org.:	\$ 15,000
Total # gifts to org.:	8
Average gift:	\$ 1,875
Largest cash gift:	\$ 5,000
Largest known gift to another org.:	\$ 15,000
Philanthropy capacity estimate (bottom of range):	\$ 50,000
Serves on the board:	NO
Serves on a committee:	NO
Former board member:	YES
Serves on other boards:	YES
Has close relationship with a board member:	YES
Attends org's fundraising events:	YES
Has made an estate gift/intention:	NO
Made memorial/tribute gifts to org:	YES
Has made in-kind gifts:	NO
Gift purpose consistent with stated interests:	YES
Has made "giving sounds":	YES
Has made "financial stress" comments:	NO
At least one asker is liked and respected by prospect:	YES



350+ Gift Officer Respondents

No Right Answer

GOAL

AVERAGE GOAL	\$ 46,797
MEDIAN GOAL	\$ 50,000
HIGH	\$ 120,000
LOW	\$ 15,000

ASK

AVERAGE ASK	\$ 68,226
MEDIAN ASK	\$ 70,000
HIGH	\$ 180,000
LOW	\$ 25,000

Wisdom of the Crowd

1. Ask amount should be a team discussion.
2. Include people with a variety of perspectives and experiences; lay and professional.
3. Do not have analysis paralysis with the empirical data.
4. The strength of personal relationships, affinity to the mission, and capacity are key.



The Ask Team

Selecting the Right Ask Team

Consider:

Prestige: CEO, Board Chair, Campaign Chair, Major Donor, Clergy, Business Leader

Relationship: Facilitating volunteer, gift officer, peer, relative

Content knowledge: Program director, researcher, physician, professor

Rapport: Gender mix, age alignment, professional alignment, race alignment, strong rapport builder

Getting the Meeting

Getting the Appointment - EMAIL

Since the people you are trying to reach are aware of the campaign / initiative and lead busy lives, getting an appointment may best be done using email.

1. Establish ask team members have pre-determined those days and times they are available for meetings.
2. Lead person sends the email to the appropriate person and cc: co-askers
3. Lead person follows up the email with another email or by phone if there is no response.

Suggested Copy:

Hi Deborah,

I am writing in the hope we can set up a time for [co-asker] and I to meet with [both of] you to discuss your support of the campaign / initiative for Organization. As I am sure you are aware the campaign / initiative is vital to our organization's future, and as members of the campaign / initiative leadership, (co-asker) and I want to be respectful and personally discuss the campaign / initiative and how important your support is to our success.

Let me take the liberty to suggest the following dates in the hope one works for both of you:

Date / Time

Date / Time

Date / Time

We can meet at your home or another location that is convenient for you. I have attached the campaign / initiative case statement for your review.

Thanks for your consideration, and I look forward to hearing from you soon.

Getting the Appointment - PHONE

IF YOU PREFER TO CALL

You will eliminate even the slightest smidgen of telephone phobia with knowledge and practice. Remember:

1. You are calling someone you know. Rapport has always been easy!
2. You are calling a philanthropist.
3. The single purpose of the call is to GET A MEETING.
4. You will refrain from asking for a gift on the telephone.
5. You will script the call and you'll be well rehearsed.
6. The call will take less than 5 minutes.
7. You will feel great!!



Build Confidence

Make your own hallucinations

Worrying is the mis-use of imagination



Volunteer Script

Scenario - Loyal door

Volunteer or Staff: Dan

Donor: Valerie

Dan: Hello, Valerie. This is Dan Smith. Are you free to speak for a few minutes?

Valerie: Sure, Dan. I always enjoy talking with you.

Dan: I haven't seen you since you retired. Are you enjoying your freedom?

Valerie: Actually, I've never been busier. I'm teaching two courses and I've got a trip to France and then a trip to India—and my daughter and her family are staying with me for ten days over the holidays. But I love being busy, the more the merrier. So, what can I do for you, Dan?

Dan: Well, Valerie, I'm working with the Campaign Cabinet for the CAMPAIGN FOR ORGANIZATION. We're reaching out to key supporters, and I'd like to set up a time in the next couple of weeks to meet with you for a half hour or so.

Valerie: Well, why don't you tell me about it now? I've got time before I have to go to teach.

Dan: ***Actually, Valerie, I think it would be best to see you in person.*** In fact, SPECIAL PERSON would like to join us. You know, you've supported Organization for a long time and we're very grateful. Are you available next week or the following week?

Valerie: Oh, I always have fun with the SPECIAL PERSON. He's a sweetheart. Do you have some material you can send me about the project?

Dan: Certainly. Let's get a time on the calendar and then I'll get that in the mail for you. How about next Thursday or Friday? We have both morning and afternoon times available.

Valerie: Well, I can do the morning on Thursday. Could you come to my house at 9:00?

Dan: Yes. That works well for us. Thank you so much Valerie. Your support is very meaningful. SPECIAL PERSON and I will see you next Thursday at 9 a.m. sharp. Have a great day!

Valerie: Oh, o.k. Dan. See you then. Bye bye.



The Meeting

Being Fearless & Setting the Tone

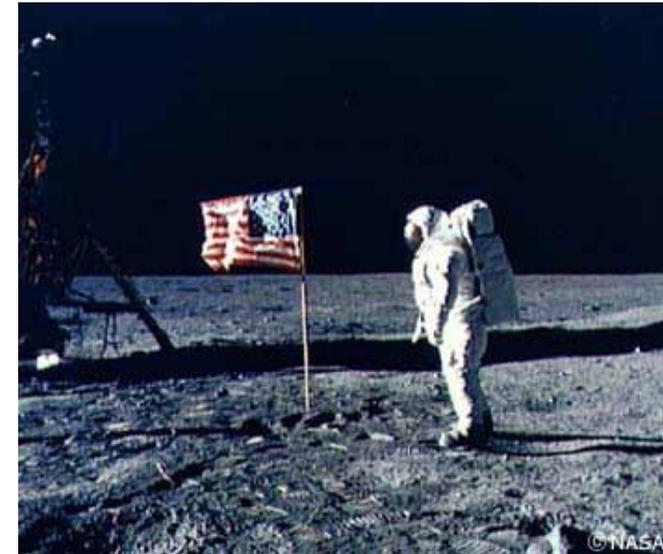
You Have the Right Stuff

“What matters is never a technique per se but rather the spirit in which the technique is used”



Viktor E. Frankl

Psychiatrists known for the theory that psychological health depends on finding meaning in one's life.



Rapid Rapport

Getting in synch

1. Smile and humor
2. Matching and mirroring your body language
3. Voice tone and volume
4. Descriptive language



Physical Rapport



Ask Materials

1. Case for Support Document
2. Program / organization specific information
3. Gift Plan Chart
4. Legacy Naming Opportunities
5. Letter of Gift Intent
6. List of Campaign Leaders



Virtual Ask

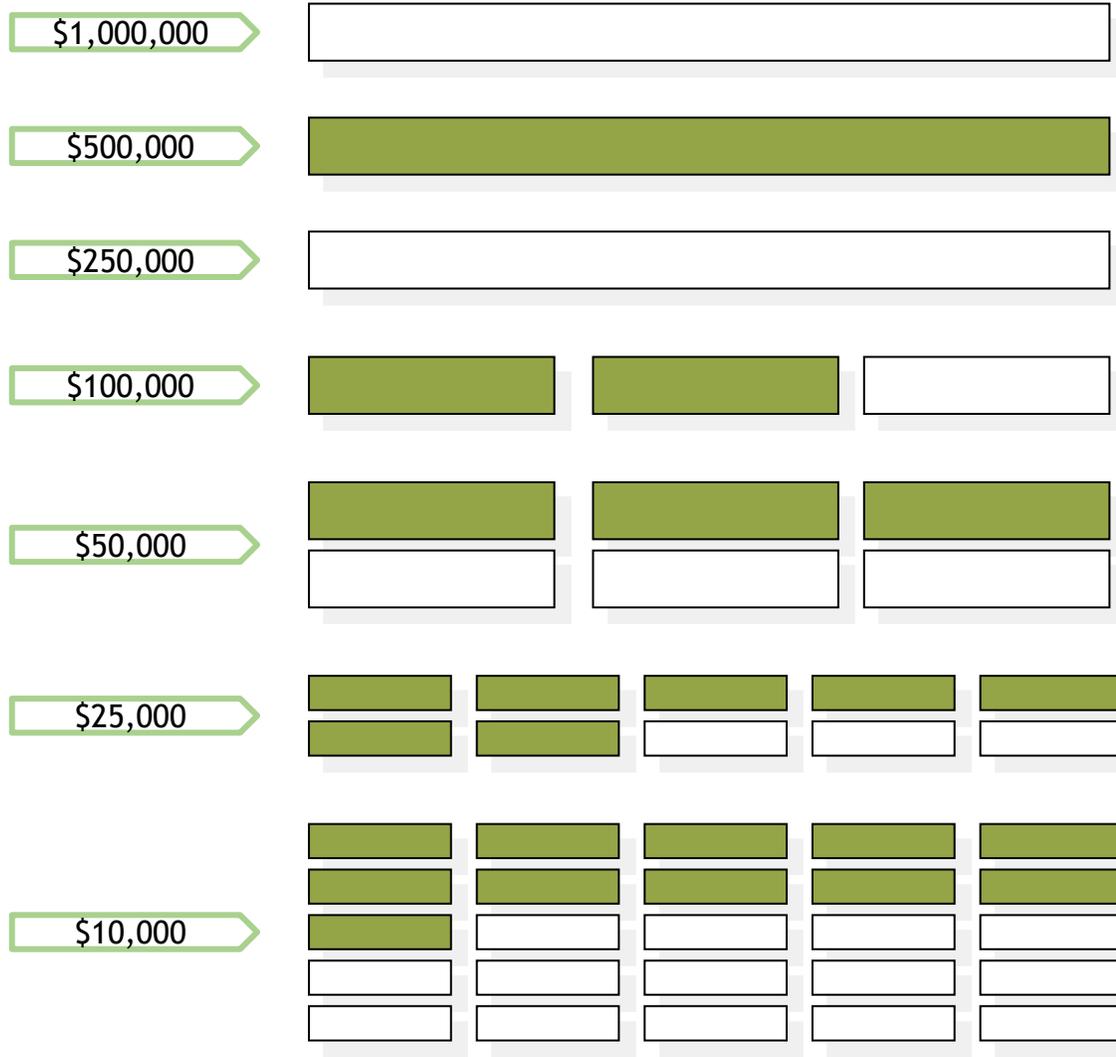
1. Done via Zoom or another platform.
2. Make sure your background and that of other ask teammates are not distracting.
3. Consider creating a tasteful background with your organization's logo and name.
4. Be able to share your screen with the gift table.
5. Express right up front that you would much rather be having this conversation in person, but safety is important, and the urgency of the cause is great.
6. Symbol Rapport.
7. Have a package of the Ask materials ready to email after the meeting.

The Ask Meeting

Start to finish- 30 minutes

1. Warm up small talk / rapport building - 5 minutes
2. Transitional phrase to get to gift discussion.
“Valerie & Mark, we really appreciate your time today. As you know, we are here to continue the conversation about the Campaign for Organization and your important and meaningful gift.
3. Would you like us to go over the **Campaign priorities / program details** and to understand why we have made a stretch gift for the Campaign?
4. Do you have interest in seeing the **Legacy Naming Opportunities** that can be used to honor your parents, your family or a loved one.
5. We want to show you the progress we have made for the Campaign to date...show **gift chart**.

\$3 Million Gift Plan



Ask Language

Pre-determine who is saying the following.

We want to talk with you about your gift to the campaign (or organization or program), but we **don't need an answer today, if you need to sleep on it.**

I don't know what is in your pocketbook, but I want to be respectful and to ask you to join me, (co-asker's name) and so many other Organization supporters and consider making a pledge to the campaign of \$XXX,XXX that may be paid over three years... this can also include remembering Organization in your estate plan... and Valerie and Mark... if I have not asked you for enough, please tell me. SILENCE

Set a time to follow-up with the response

Amount Offered is Well Under Ask Amount or was a Preempt Offer

Low Offer

1. Thank you for your pledge of \$25,000. That is a generous gift and is very much appreciated.
2. We realize we are asking you for a significant gift because it is for an urgent and much needed purpose. You, and your family are looked to as important supporters of Organization and that is why your investment in this campaign / initiative / our mission is so important. Is there more information you can use in your consideration?
3. We understand your position now, but may we have your permission to revisit the topic with you as we near the close of the campaign, in the event we need help reaching our goal?

“THEY
OFFERED
WHAT?!”



Possible Objections

1. “I’m not sure I can do that right now.”
2. “Has each board member given at this level?”
3. “Doesn’t the state already give Organization plenty of money?”
4. “I’ll have to see what my spouse, partner, attorney, financial advisor think.”
5. “When do I need to decide?”
6. “Can I do this in my will?”
7. “But I already give my annual gift.”
8. Others?



Timing Not Right

Need to talk it over with the family:

That is certainly understandable. Is there more information you can use in your deliberation? Let's set a date when we can be back in touch with you...would next (day and date) make sense?

I would like to help but I cannot at this time:

We thank you for considering this gift seriously, and we understand you have many things to consider. You and your family are looked to as philanthropic leaders and that is why your participation in this campaign is so important. If what we ask for is too much, please consider a gift that is possible so we can count you among our leadership donors who are early supporters this effort. Please give this request your most serious consideration. Is there more information you can use in your consideration? I will be revisit this request with you next (day and date). Thanks again.



"QUICK, TABLE TWO HAVE BOTH GOT THEIR MOUTHS FULL,
ASK THEM HOW THEIR MEAL IS."

Closing the Gift

1. If no decision: I understand you need to think about this request, may I follow up with you on A PROPOSED DATE/DAY?
2. Would a pledge period of **5-years** rather than 3-years be helpful to you?
3. Would you like to discuss a **Legacy Naming Opportunity**?
4. If part of your thinking includes **remembering Organization in your estate plan**, we can visit with you again with our estate gift expert to discuss how that may work.



Quick Ask

You're meeting with DONOR NAME who has given annual gifts of \$1,000 each for the past 4 years. DONOR NAME recently accepted the invitation to be on an advisory committee for the Organization and has been talking about "doing something more significant." ASKER NAME have discussed some key projects that DONOR NAME is very interested in and your research assures you that DONOR NAME has the capacity to give up to \$25,000 overall on an annual basis. With input from a board member, ASKER NAME and BOARD MEMBER decided that a \$10,000 ask for an annual would be appropriate.

MAKE THE ASK.



Quick Ask

You are having lunch with trustee DeMeco NAME who has given annually for over a decade and who has also given two transformational gifts to your organization. It's close to the time of year when the Board Chair NAME traditionally asks trustees for their annual gift. TRUSTEE NAME says to you, "I suppose we're here to discuss my annual gift. Last year I gave \$2,500." While you hadn't planned to make an ask at this lunch, you remember that the CHAIR NAME and you had agreed to ask for a \$10,000 gift from TRUSTEE NAME, knowing that she gives this much annually to two other charities-- while declaring that yours is her favorite cause. You and the CHAIR NAME decide you must respond to TRUSTEE NAME's preemptive offer.

MAKE THE ASK.



Quick Ask

You are visiting with donor NAME who is a long-time board member for the organization. You are in the silent phase of a \$5,000,000 campaign for a new building that DONOR NAME has indicated a keen interest in naming. DONOR NAME has previously named buildings for other institutions. ASKER NAME and your CEO NAME have assessed that DONOR NAME is ready and primed to be asked for \$1,500,000 for the naming opportunity.

MAKE THE ASK.





Terrified

1



Apprehensive

2



Suspicious

3



Ambivalent

4



Sassy

5



Game

6

How are you feeling now?

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