

## 8 Steps of a Major Gift Ask

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Though some donors give to schools without being asked, in most cases, meaningful giving happens because someone asks. When we are hoping for substantial gifts from current or potential major benefactors, those asks must be done in a way that is clear, thoughtful and compelling. To make this kind of request from a donor who is important to us, none of the following eight steps can be skipped.

1. **Set the appointment:** Nothing happens till this does. Avoid too much detail about the purpose of the meeting. Say something like, “I’m working on the campaign for [school] and would like to talk with you about your possible involvement.” Sometimes the response will be something like, “We’re not in a position to give at this point...” To which you can respond, “That’s okay, all I’m asking for at this point is the opportunity to tell you what we’re up to and let you determine whether you have an interest...” The best place to meet is at the school or in the person’s home, next would be their office. Restaurants are problematic because of distractions and lack of confidentiality.
2. **Know the prospective donor:** Even if you know the person, take time to review his/her/their file. You’ll often be reminded of important information that isn’t top of mind: children’s names, issues raised in the last conversation, events at the school, most recent gifts. I’m surprised how often this information is key to the conversation.
3. **Practice for the call:** It’s always beneficial to run through the call with the others who will be involved, or someone familiar with the donor. It feels awkward and artificial to role play in advance, but it’s amazing how well it prepares you for the give and take of the actual meeting. If there is more than one person from the school, decide who will present what and who will make the actual request.
4. **Give context:** Even if the donor feels she knows the cause well, take time to explain it and paint a picture for her. Use the case statement or materials prepared. Numbers and logic are helpful, but more important is sharing your own motivations and emotional reasons for being involved. Consider what you know about this person’s values and interests, look at the project from their perspective and frame your presentation in those terms. This would be a good time to explore particular aspects of the project that might be named gift opportunities.
5. **Ask for a gift:** It’s important to ask for a specific gift, so that the person understands what he could do to make the overall project a success. But it’s also important to do so in a way that makes it clear that it is this person’s choice. They have been entrusted by God with this decision as a steward of resources. If God trusts them with the decision, we can too. The request might sound something like this: “In light of what I’ve presented and the importance of this project for [school], we were hoping you would consider a pledge of \$500,000 over the next 3 years to fund the [named gift opportunity]. You may be interested in doing more than that, in which case we would be even closer to our goal. Or you may feel you can’t do that much. Whatever you decide, based on your understanding of the project’s importance and your own circumstances,

will be gratefully accepted.” After this is said, stop talking and let the donor respond to your request. Our temptation will be to feel we’ve put him in an awkward spot and we want to cushion it with more words. More often than not, this is distracting for the donor, who is giving serious thought to your request.

6. **Handle objections:** Objections may come after your request has been made, or they may come before. In either case, these are opportunities to hear what the donor is thinking, what’s important to her, so these are crucial moments in the meeting. The best way to handle objections is to acknowledge the legitimacy of the issue, share how you may have had to deal with that yourself, and then what conclusion you came to. A good structure for doing this is called “Feel, Felt, Found.” You might say something like, “I know how you *feel* about that question of whether technology has more bad effects than good. I *felt* that myself as I looked at that project and thought about the impact of technology in my own life. What I *found* is that these kids are entering a world saturated by technology and we need to prepare them for it and put it in a Christian context.”
7. **Finalize the pledge:** In some cases, the donor may agree to a pledge before the meeting ends. In this case, have a pledge form ready and help them complete it to record their intentions. In most cases, the donor will want additional time to consider the request or how they want to honor it. In this case suggest a timeframe when you could get back to them to finalize their intentions. Do not simply leave them a pledge form and ask them to return it when they have decided. Not even if they suggest that. Given all of our tendencies to procrastinate, they may get distracted and it will feel like nagging when you follow up if they don’t respond. Make the action step yours to check back with them in a time frame that works best for them.
8. **Thank.** Thank them for the opportunity to present the case. Thank them when they’ve made a decision. Have others important to them offer their thanks as well, respecting any desires for anonymity. Some thanks will be formal, but include personal thanks as well. And make sure the school follows through on promised donor recognition. Helping to make this a great experience for the donor will increase the likelihood of giving in the future.

For more information about Development best practices in a faith-based school, including the [5 Core Requisites for Development Success](#), please visit our website at [www.managingformission.com](http://www.managingformission.com).