

## Major Gifts: Be Bold In Asking!

A recent edition of the *San Francisco Chronicle* contained a front-page article about Dede Wilsey, a prominent Bay Area philanthropist who was responsible for raising the lion's share of the \$190 million for San Francisco's new de Young Museum. I quote from the article:

"Dede Wilsey sidled up to Steven Read several years ago at a party at Mondavi's Napa spread and broached the subject of a donation for the new de Young Museum. He asked her to send him some information. She told him flat out that wasn't her style and pitched him right there.

"'I know you care about art,' Wilsey recalled telling Read, a fellow museum trustee. 'You must care about the museum. We need to rebuild it. I know you have money, and I need some of it.'

"Read pledged \$1 million on the spot. Wilsey thanked him, said she'd confirm the gift in writing the next day and strolled over to museum director Harry Parker. 'Harry,' she said, 'this is going to be easy.'"

What lessons might nonprofits large and small that are planning to solicit major donor prospects learn from Ms. Wilsey's plan of attack? Three come to mind:

- Know your prospect's capacity. Ms. Wilsey asked Mr. Read for a specific amount of money. She did not pull the \$1 million figure out of the air. Rather, based on her relationship with Mr. Read as a fellow museum trustee and philanthropist, she knew that he had the capacity to make a seven-figure gift. If you don't have access to such anecdotal information, there are tools available to do research on individual donors.
- Know the approach that will work best with the prospect. Ms. Wilsey knew that Mr. Read would appreciate the "no nonsense, put up or shut up" approach. Note that this approach worked well with Mr. Read but might not be appropriate for other prospects. Does your prospect like the hard-hitting approach or the more oblique, "long-white-glove" manner? Be alert to the way in which the prospect would like to be solicited.
- Thank the prospect—who is now a donor—indicate that you'll confirm the gift by letter the next day, and be sure to send the confirming letter. In fundraising, the devil truly is in the details. Confirmation of the gift by letter may seem screamingly obvious, but too many nonprofits fail to take this crucial step and then wonder why the promised gift never showed up.

A later encounter between Ms. Wilsey and Mr. Read documented in the S.F. Chronicle article affords us a fourth lesson: be bold. To quote from the article: "After the museum was built, Wilsey noticed a small seating area near the second-floor American gallery bearing Read's name. The seating area hadn't been on the blueprints or named. She informed Read, the museum's building committee chairman, that it would cost him \$1 million more.

"'You are incorrigible,' Wilsey recalls Read telling her with amused exasperation. She suggested he make the extra gift in his beloved mother's name. Read gave in, naming the space in honor of his children and their spouses."

Be bold, be specific, and be appreciative, and you will prevail in your major gift efforts!

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## Major Donor Campaigns: The Heart Of Any Successful Fundraising Effort

The following is adapted from Zimmerman Lehman's newly revised [\*Major Donors: The Key to Successful Fundraising\*](#).

Whether for capital, annual or endowment gifts, major donor campaigns are an extremely effective means of raising significant income. Make a major donor campaign part of your nonprofit's fundraising arsenal; it will be well worth the investment of time and money.

Just like a direct mail campaign, special event or phone-a-thon, major donor solicitation is most successful if scheduled as part of your annual campaign. You may also do a "one-time" major donor campaign to raise capital or endowment funds. If you're pursuing big donors to meet operating expenses or project budgets, this is part of your annual campaign. If big gifts are for building or large equipment purchases, building renovation or land acquisition, then the major donor effort is part of your capital campaign. If you're establishing or increasing the size of your endowment, major gifts are crucial.

What does Zimmerman Lehman mean by a major donor campaign? Simply this: major donor prospects are not approached in isolation. Rather, they are solicited in a compelling fashion, more or less simultaneously, by trained solicitors who have given sufficient time to planning and coordination of the campaign.

Major donor campaigns, whether part of a capital, annual or endowment effort, are overseen by committees. Board members and other volunteers, with the assistance of staff or consultants, form a committee to develop a strategy, theme, materials, and campaign calendar. The committee determines who the best prospects are and, having been trained to ask effectively, approaches donors with an overall dollar goal in mind. (Note the staff "staffs" the major donor effort; it is primarily the board members and other volunteers who ask for the gifts.) The committee determines:

- The dollar goal of the campaign
- The amount that constitutes a major gift
- Whether to hire an outside consultant
- Who the prospects are
- Which solicitors will approach which prospects
- Which prospects will require formal research
- How to recognize donors

The committee is also responsible for preparing a campaign budget and time line, and for making sure that committee members are properly trained in the art of asking for big gifts. Even the best solicitors need some prepping, and most need a great deal. If your organization does not use a consultant for the entire campaign, you should bring someone in to instruct the solicitors on how to ask effectively. There is an art and a science to asking; training builds confidence and enthusiasm.

Once the prospects have been identified, it is important to match prospects and solicitors appropriately. Also, it's often a good idea to send an experienced solicitor with a rookie. This is a great way to train new board members who have never asked for a big gift.

Training ensures that everyone is on the same page about the campaign and the organization's needs. Effective major donor training includes interactive exercises to help solicitors overcome their "fear of fundraising" and to tap into everyone's excitement about the organization and the campaign. The most important exercise in major donor trainings is role-playing: there is nothing like a role-play to alert solicitors to what they need to learn in order to ask for big gifts comfortably and effectively.

Every committee member must make a gift to the campaign to the extent of his or her capacity. The individual you solicit for contributions won't usually ask how much you gave, but he or she may well ask whether you gave, and obviously you must be able to respond in the affirmative. Also, the more money that has been raised before kicking off the campaign, the more impressed prospects will be with the seriousness of the effort.

Your case statement will help articulate the purpose and goals of a specific campaign. Your "case" is the rationale for why the organization needs the money and is what the solicitors leave behind after the visit.

The heart of the matter is, of course, the "ask" itself. Once the match is made, the materials created, the research completed, solicitors trained - you must face the moment of truth: the "ask." The beauty of conducting major donor work in a campaign context is that the solicitors can meet during the campaign to share "war stories" and offer emotional support.

The committee must also spend time thinking of exciting ways to recognize major donors. Listing donors' names in newsletters and affixing plaques to walls are fine, but how about something more exciting? Why not host a party to thank major donors? If this is a capital campaign, naming opportunities are a wonderful means to recognize donors. Even fairly modest gifts can be "named;" in one school campaign that Zimmerman Lehman conducted, we placed a naming plaque on every computer in the school's computer lab!

Finally, soon after the end of the campaign, the committee should meet one last time to evaluate the campaign. Things to consider: Was the campaign dollar goal too modest? Too high? Were the solicitors trained effectively? Did the written materials make the case effectively? Did the solicitors have adequate information about prospects before visiting them? Did the solicitors do an effective job of asking? What worked? What didn't? What did we learn for next time?

*From: <http://www.zimmerman-lehman.com/majordonorcampaigns.htm>*