

# Gifted Asking| Asking Well

Wed, 17/11 02:00PM • 55:35

**Hosts: Amy Stevens and Chris Goldie**

[Music]

Amy: Welcome everybody. Thank you for joining us. I'm Amy Stevens, I'm Chief Executive at Gifted and I'm here along with my Colleague, Chris Goldie, who's one of our other directors and today we're here for the second part of the gifted asking webinars - asking Well. Today we are recording this as always it'll be available on our website in a few days. So, if you did miss part one, but you're here today and want to catch up, that's already on our website. And similarly, anyone who was on part one but obviously is missing today, will be able to catch up on the website later in the week also.

00:46

We'll do all the questions at the end. So, please do pop any of those in the Q&A and we'll cover those at the end. So, last week we spoke about getting ready to ask – so, understanding the motivations behind us giving, gift policies, what do you need to have in place before you start asking. All that planning of who's going to ask when, how you cultivate the prospects - and today we're looking in a bit more detail at the asking process itself.

01:18

So, to start with just a bit of background when we're thinking about securing those major gifts. You know, the principal reason that charities fail in securing those key gifts they need is because they're not asking people properly. So, that's all about what this series is about really. It's in the preparation, to make sure you ask for the right thing, but also that they're asked properly with a clear ask to give, ideally, peer-to-peer, directly from somebody that they know. So, you know, it doesn't matter, you could have done all cultivation you want, you could have done all the research that you want, but if you ask is weak, hiding behind a letter that arrives on their desk you'll get a donation and not a gift, which we spoke about last time in detail.

02:06

So, before we start to look at the actual ask, we also then start to look at identifying and qualifying our prospects. This sounds quite clinical but it's actually a really important way of following on from last week's webinar, thinking about how do we know that a prospect is ready to be asked? And, therefore, how can we use all those tools we spoke about last time to make sure the ask happens properly. So, we consider each prospect, so each potential giver across four categories. First of all, capacity, you know, wealth levels. Do they have the means to make a gift at the level that you want and remember, as we discussed last time, major gifts are very different things for different charities. For one charity, a major gift could be five thousand for another it could be fifty thousand, five hundred thousand even.

03:00

Second, inclination. So, do they have a track record of giving to your organization or to similar initiatives? Interest - have they shown an interest either in your organization itself or the particular project that you're fundraising for? And, finally – access. Do you have direct access to that person? That obviously is GDPR compliant as well.

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So, to think about that in a little bit more detail. We've just got a screening sheet here that shows how to look at this. Under each of those four categories - capacity, inclination interest and access - we award 25 points for each of those categories. A potential score of 100, total score of 100 and on each of those you score each prospect. So, here we've got Mr prospect, Mrs visitor, Mr giver and Miss maybe. Against those different criteria, create a list of questions that are bespoke to your organization. For some, well for most, for capacity, you know, those questions are obvious. Do we have a published wealth level, you know? Do we know because they've given x amount to other charities what their giving capacity is? Remember of course that published amounts aren't necessarily accurately reflective of somebody's financial situation. Somebody's wealth could be tied up in property. There's other, you know, forms that they can't access, so we can only work with what we have but obviously you can try and find the best scenario for that.

04:40

In terms of the others, it's a bit more about thinking in a bespoke manner. Let's say you are a hospital. One of your questions with a score of 10 of those 25 points might be, have they given to us before? Another might be more bespoke, so if it's a cancer project, have they given to cancer before? You can create questions that then allow you to score your prospects against these categories and give you that total score.

05:12

Using the total score then, determines how you proceed with that given prospect. So, anything above 80, they're pretty much ready to be asked unless you are on zero for access or near enough and so you have no way to get to them. You're pretty much in the realm to be Asked, and we talk about in our book, Gifted Fundraising. So, not this new book, our original book, which is the full spiel on our fundraising approach. We talk in more detail about the different borderlines and what to do at each stage, to take your prospect to the next level. But it really helps us this process, in looking at what we then need to do to be able to ask.

05:56

So, for example if you know everything else but you have no access to the person, then you know that this is a real potential prospect but we've got to find direct access. So, you must do that before you approach them obviously out of the cold and it just really helps us to target them and create, as we talked about last time, these approach plans for each prospect, so that as fundraisers when we're supporting trustees, governors or the volunteer leadership in making these approaches, or indeed doing that that ourselves, that we're as best equipped as we can be. And, we know we've got the highest possible chance of a prospect saying 'yes'.

06:40

Chris, I don't know if there's anything you want to add on that before we move on to actually asking for the gift?

Chris: I hope everybody can see me as well. I can't see myself but I'm assuming you can all see me? Just to reiterate the Miss maybe Example. Miss Maybe may be the wealthiest person in the world and you may think that she has an interest but you don't know that and, most importantly, you don't know how to get to her and without that access she is and will remain what we call a 'suspect' - somebody who is a distant potential giver. The best example I can possibly give from the many studies I've done over the years, is the number of times I've heard the name Richard Branson. Oh Richard Branson would love this! Well, he might well love it but if you can't get to Richard Branson to speak to him, then you might as well scrub him off your prospect list. So I think the key bit here about your prospect screening, you know, wealth, interest, inclination, are all important - but the most important is the opportunity the ability to be able to get to that person directly

07:47

Amy: Absolutely. Okay Chris, take us through some five steps to securing meaningful gifts.

07:54

Chris: Thank you, Amy. So, we have always broken this down into what we would like to consider a fairly simple and straightforward steps towards securing a gift after a period of cultivation and that's really what this covers. I should also say that we are focusing this in many ways on the volunteers, the leadership, the people who will actually be doing the asking. Now in some cases that will be you, in which case, you know there may be one or two comments on here that aren't directly applicable. But, if you look at it in the broader context, of this as a tool for you to use not only in your own approaches, but also when briefing your volunteers, your development board members, your campaign leaders, whatever they may be, then these are the steps that we believe they need to be able to follow.

So, the first stage, very clearly, is the planning of a gift. If you're briefing a volunteer, it's very important that the volunteer will have made a gift themselves. Why? Because we know that people respond far better when they're given the 'join me in supporting' message. Then they are in the 'please will you give to this particular cause' and that's very logical.

09:00

Why would anybody do something that you're not prepared to do yourself? So, if you're briefing a volunteer, it's very important that volunteer will have already made a gift. It doesn't need to be the biggest gift in the world, it's the principle of having made the gift that is important. In the same context, when you sit down with your volunteers, you want that volunteer to be in charge of the prospect list that he or she is planning to approach. These need to be people that they are comfortable speaking to, that they're happy to have the conversation with. They may not be bosom buddies, they may not be best friends, but they're people who they have a sufficient degree of knowledge and intimacy with to be able to say 'they're on my prospect list. I will talk to them.'

09:40

That then defines, going back to Amy's point, within that list there may be some who are their best friends and who they do not feel need cultivation. When you're working say in a school context, it might be that you know if you're dealing with the chairman of an alumni association, that he or she will think, 'I can go straight to all the other members of my alumni board. They don't need cultivation. I need to ask them to be part of this journey from the outset. But there'll be others, other alumni may be within the association, who do need cultivation. So, it's very important to understand what that cultivation is going to need to be and then you can map out how it might actually take place.

10:16

So, in your planning then fix the date to approach the person that you want to go and speak to. First set a date, get it down in stone like any other business transaction and you need to be able to get that in the diary so that everybody's very clear that's when it's going to happen. And before you have that meeting, it's very important again to consult with colleagues. Why? Because we want to make sure that other people haven't spoken to them, you know. The worst thing that can happen, in fundraising terms, is confusion. Many, many years ago, when applying in this case to an institution, we'd been working with a client. I'd submitted an application. We were having a virtual phone call, a zoom call about it and the prospect suddenly said, 'oh, you do know somebody else has approached me from within your organization.' Now, we knew nothing about that and I was dealing with the chief executive of the organization. So, it was somebody in the learning team who was looking for funding for a different project and it just confused things. That's the last thing you want when you are planning your fundraising ask, is to have any element of confusion whatsoever.

11:16

If we can move on then to the next stage. So, you've got your meeting and now you want to inspire and again if you are a volunteer or if you're briefing your volunteer, it's very important that the volunteer leading the ask understands the significance of declaring their own support for the project. In other words, why have they backed it? What was important to them? Why have they decided that they're going to make that gift? Is it a love for the institution? Is it a belief in the cause? If it's a social welfare cause, is it about disadvantage? What has inspired the asker to part with their own money through a thoughtful and considered gift? Because that inspiration is what you need to inspire the potential giver, the person you're talking to.

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it's very important in that context you speak positively about all the benefits that your gift will produce and the impact that might have on the institution or society in general or even the individuals who will benefit. Because, this is absolutely key and it's very important that your volunteer leadership understands that major gifts are all about opportunity. These are not, 'please help us we're going to die without your support.' This is look at what we can do if we're able to raise this money. This is an opportunity for us to make our school our theatre, our hospital, our church, our cathedral - whatever it might be, a better place and provide more opportunities for people of all ages backgrounds to benefit from whatever the particular project might be. And, within that context, as part of that inspiration obviously use whatever promotional materials you have to hand. In the modern world that could be digital, it could be sharing a brief presentation on a website or an ipad - but it equally can be printed brochures as well and there are very many good examples of some very good information packs that we very often share at both information events and in one-to-one meetings that will give visual imagery, good sharp descriptions of the benefits that you can talk to and explain and use to be able to inspire your potential giver to consider making a gift.

13:20

Assuming, therefore, that you've done that, you then naturally want to invite questions. It's really important when talking to a potential major giver that they feel engaged in the project. You know, what you want from a major giver is somebody who believes in the project and wants to help to shape that project. Now, not every time can their suggestion or recommendation be woven into the project but the more interested they are, the more questions they ask, the more likely they are to then agree to support that. And, within that context, you need to talk, encourage that dialogue. Don't feel shy. Ask them to be, you know, be honest in your responses. If you don't know the answer to the question, you can always come back to them, but if you've been well prepared and well briefed you probably will know what all the questions are likely to be. But really encourage that dialogue. This is not a simple 'please give us your money'. It's a, 'we'd like you to consider making a gift and these are the reasons why. Do you have any questions about it? What is it that you would like to know?'

14:23

Again, as I said, if you don't know the answer please don't make one up. Say you can refer to colleagues and get back. Again, if you're the volunteer leader or if you're briefing your volunteer leader, really stress the importance of declaring their own personal gift. Why? Because that helps to set a level of expectation. Maybe with the donor, you know, if I've given 10 000 pounds or something, then I think it's fair to say the person I'm speaking to and on the basis that I've done my research and I know they have a similar capacity to me, I'm hoping they're going to give the same amount. You might find that your friend is very pleasantly surprised and they might top you. You know, they might think, 'well, if he's given 10, I could give 20. There's one up for me!' But in the main, people will generally match the gifts that are given by their peers. Why you gave it comes back to the inspirational thing but again explain that you gave for a particular reason or particularly a number of reasons.

15:17

You can also refer to how you have benefited from a tax perspective, you know, what you've saved on your tax return on an annual basis. How you've managed to make sure the value to the recipient is that much greater than the actual cost to you. This is a really fundamental part of major giving. I think a lot of people, I'm constantly amazed at the number of major donors, people with wealth who don't really understand the gift aid system. In particular, don't understand how they can offset a significant proportion, a further 20% or even 25 % against their tax bill - and of course when you're speaking to people of great wealth, particularly those who receive maybe large annual bonuses, the ability to be able to slice a chunk of tax off is very appealing. So, discuss the tax benefits with them and explore what might be of greatest interest to them.

16:06

In some cases, people will ask you 'what do I get for my money?' - in other cases, they won't, but always be prepared to offer recognition, you know. What would they be interested in receiving? That might well be that in your planning. You've already constructed a recognition program, now whether that's a declaration that everybody will get a plaque or a seat or whatever it might be in their name but be prepared to offer it if asked - and obviously the larger the potential gift the greater the potential for recognition. And again, be prepared when you're going to that big major gift meeting that somebody may ask for the earth and in that context, as Amy and Andrew were discussing last time under gift policies, you need to be very clear about what it is you can and cannot offer in return for a gift.

16:47

Again, listen to their reasons behind wanting to make a gift and encourage them to ask further questions which you then will be able to answer, because all of this is leading them to a point where hopefully their mind is made up, their questions have been satisfied, they know what they're going to get in return, they know what the tax benefits might be and therefore, the final piece of this jigsaw is - are they going to actually give? And to do that, you have to ask.

Amy: ... and I think that last point's particularly critical isn't it Chris, because what people tend to do, especially when they're nervous asking for a gift, they make the ask and then kind of continue talking and talking about the project. And actually, if you just then sit and Listen, the other person will respond and hopefully in a positive way. But either way, you know, you will have some sort of insight or a gift. Even so, really important that you then sit back and let them respond to your request.

Chris: Yeah and I think in that context, this is about securing the commitment, you know, you have to remember that an ask ultimately is precisely that. It is an ask. Your mission is to secure a gift at the end of this cultivation session, so you need to clarify the level of interest. You need to understand what they're thinking. They may well turn around and say look, you know, at this moment in time it isn't right for me to be giving at that level. That's fine. You need to know that because we're going to come on to that shortly. You need to have some potential suggestions to make back if they've agreed to give, if you've made that ask, if you're volunteering. There's a story in the new book of many, many years ago, working with a theatre in London where we had a fantastic meeting with a potential donor and literally at the end, the artistic director of the theatre stood up and said it'd been great seeing you, great to catch up, hope that's answered all your questions - and I literally had to put my hand on his on his shoulder and just push him back down to the chair and said look, I hope you don't mind me asking but we've talked about it all, but, you know, have you had a chance to consider whether you will make a gift and if so what that gift might be? And the guy leaned over and said, 'I thought nobody was actually going to ask me for money!'

18:48

And that that is the critical bit. Assuming that that's been done, they've declared what they're going to do, they say 'oh this is what I'm interested in doing,' the next thing, clearly, is the formalization of that gift through a gift card. Now, hopefully, within your pack you will have a gift card ready. In these days of zoom, as we're finding currently, very often you're securing a gift via zoom and you've then got to deal with getting the gift card to them. Ideally, you want to do that on a face-to-face basis. If you've got it in the meeting, that's the way to do it. If they're not ready to sign, then you thank them for their time and you make the appointment for the follow-up and we'll come on to why that is shortly. why that's so necessary. Surely, you go away, you go back, you update your information, you add to your gift log, you know that commitment's coming in. You also make sure that, you know, you haven't yet got the signed gift card if that is the case, so that you can make sure your follow-up is focused on what you need to do next. And of course, the last thing you do irrespective of the outcome, is you thank the prospect for their time and, of course, if they've given, you thank them equally for their gift. I know everybody will do that but it's worth reminding that 'thank you' is the most important word in fundraising.

19:53

Yeah, anything more from you, Amy, on that?

19:56

Amy: Yeah, I mean just to add about that, securing the commitment and actually asking for the money. So, again like you, I

had a client pre-pandemic and I was actually meeting a gentleman for a feasibility study interview, so we actually weren't asking at that time. We were scoping a project and the first thing he said to me he was, like, 'are you going to ask me for a gift?' I said, 'no, no, no. We're just here.' and he's like, 'oh god, will somebody ask me? I am ready, will somebody just ask me and I will give.'

20:24

And this is because the team hadn't been versed in looking at where each prospect was. Were they ready to be asked and they'd done so much cultivation that they were on the point of tipping the potential giver into, 'well, I'm not going to if you don't ask me!' So, it's so important that we actually make those asks at the right time.

Chris: Absolutely,

Amy: In that context very often doing studies, you know that that conversation will be had with a study interviewee. What we tend to do in those situations, is go back to the client ahead of a report being written and say, "look i think you need to sit down, arrange a meeting with this person. They have said they're ready to make that gift, so, you know, we haven't asked them, it wasn't our job to ask them, but get on the phone, get that meeting in the diary with whoever is the right person and go and have that meeting ahead of us completing the report do not wait for our report because this person is ready to give.

21:16

Chris: Yeah, definitely. Okay so we'll just think a little bit about asking during post covid 19. Obviously, everybody was very, very sensitive about this, particularly when the world was upside down about asking in the current climate. And yes we need to be sensitive because people's situations have changed. Some people who, you know, were very wealthy, now might not be. However lots of people who were very wealthy, are now even wealthier. So, let's not forget that as well. Particularly some companies, a lot of companies have done incredibly well through the pandemic – so, yes, be sensitive but if we're following all these steps that we've been through in the two webinars, we shouldn't be causing offense, because you should be prepared to make the ask.

22:10

Do not be tempted to write letters even if having to do it virtually and I think even into the future we'll be doing that a lot more. Face-to-face is always best when you're asking. Remember that people are keen to hear good news. We're still keen to hear good news after the last, what is it, 20 months we've been through? And, heading into winter again - and so don't be afraid to share good news about your charity, about the organization you're supporting. Last year, Giving Tuesday was up 42% on the year prior which just goes to show that people were stepping up and giving to charity. Giving Tuesday this year is the 30<sup>th</sup> of November. It'll be really interesting to see what that figure is this year and how kind of the general public as well as major donors have reacted the change over the last year or so. So, keep your eyes peeled for that and we'll, I'm sure be putting something out when those figures are in.

23:07

Amy: Any other thoughts Chris on kind of post Covid asking, before we go into the scenarios?

Chris: Not particularly. I think we've covered it all. Just to say that, you know, very obviously and sticking with the good news bit, the world is still in a very strange place. Covid, politics, whatever it might be, there are lots of things happening in the world that are quite depressing and good news is one of the things, hope for the future, optimism, you know, a good project that will deliver great outcomes is something for everybody to be excited about - and we have genuinely found a lot of people over the last year and a half who have said to us when doing our study work or even in campaign, 'You know we want to support because we know that we want to come out of this in a better place than we are currently.' And so, feed off that, make sure that people have that optimism to look forward to or share that optimism with you and good things to look forward to.

23:58

Amy: okay, so just a few scenarios that are in the book and to reiterate as well, in the Asking book, all those steps that Chris talked through there are in full detail in the book and there's details of how we'll send you one of them at the end of the webinar. So, these scenarios we quite often will do these as role plays if client teams are up for getting involved in that, how these pan out and how you can overcome objections.

24:28

So, first scenario. "I already give to charity." So, you're meeting with a potential giver to the campaign who already makes a monthly gift of £10, but you think they could give much more. When you ask for a gift to the specific campaign, they're affronted and say I already give generously to you. Can't you count that as my gift?

24:52

So, lots of different things to consider here. First of all, that preparation comes into play because you should definitely know that they already give to you, before you're going to ask. So, either as the fundraiser you should have briefed whoever's asking or as the asker you should have consulted with the fundraising team who holds the data. So, you should always know that because how embarrassing not to. Obviously acknowledge their current commitment as a regular giver or whatever that gift size is. They are committed to your organization and they need thanks for that. And then, really important to explain that you know you can't simply move a gift over. Let's say we're talking about hospice. Somebody gives regularly to revenue fundraising and you have a new build for some additional rooms, for example. You know moving that gift over is the age-old robbing Peter to pay Paul and we can't do that.

25:51

So, the way around that is to think about, you know, talking about the additional impact that gift will have and how important their current gift is in maintaining operations. But, in addition to that, we could achieve 'xyz' with further support. Anything else Chris?

Chris: Well only just to reinforce that point. I think it's one that churches for example will very often find themselves faced with, it's a dilemma because people will regularly give to their church through going on a Sunday through the plate, you know, whatever. These days, t's more digital but, you know, there will be people who believe they are giving and they are giving very generously on a weekly basis. When you're dealing with a capital campaign it's a moment in time, it's a generational thing. It's a gift of this generation to future generations. It's something that actually, you know, if you've made the decision to do it for whatever reason, whether that's because the building is falling down or you want to create something that's going to make sure the long-term future of the organization is viable and

sustainable, it can only be delivered now. And, as Amy says, you don't want to take money away from the operational side of the organization to fund the campaign. It's got to be done separately. The same question can often be asked in an independent school where parents are paying fees, you know. I'm paying my fees every year, why do I need to pay more as well.

27:11

It's a very good question and it's a very fair question but the simple reality is that when building something or developing an endowment fund for bursaries that is over and above what the normal expenditure of the school is, then new money is needed and that new money can only come through an additional gift.

27:28

Amy: Okay, scenario b. So, this is another one that we often come across. So, it's a giver who's retired, known to be particularly wealthy, they give generously to local good causes and obviously as fundraisers we all have great expectations that they're going to be the person that's going to deliver the big five figure gift. If you've made that level of gift yourself, you're probably even more hopeful than expectant that is the level they're going to give. But, they may well say, 'look. it's a great project, but at the moment the time isn't right.' This is just the example we use, but it's a very common one - that they are funding their grandchildren through school fees and it would be great when it's all over in a couple of years-time. So, that sort of scenario. The 'I want to give, but now is not the right time.' How do we deal with that going forward? Well, the first thing, obviously, that we should always do is show a degree of sympathy for their particular situation, you know. It's not their fault that they are where they are in their life and the fact that the campaign is timed at this particular moment may not suit them, but that doesn't mean that they can't be supportive. That's why we very often have a pledge period. Explain why the pledge period is in place and explain why a pledge period actually covers you know, recognizing particularly with a capital project that this is only the start. You've got to raise the money, then you've got to build it and all that is going to take time and eventually the building will open and everybody will benefit but within that period there may, there may well be scope after those last two years have gone and the youngest ones finish school, that support can still be made. Now it may not end up being the same level of support as it might have been over a four or five-year pledge period but the opportunity to give remains open even if they can't give straight away. The other way to think about it potentially or to mix it, is to suggest the potential of a legacy pledge particularly if they're older. Is there something they'd like to consider for the future, you know, make a legacy pledge now, give the recipient some element of security, but you're not actually parting with any cash. And, as we know, that is particularly relevant in organizations where they have a particularly old constituency who may be nervous about committing too much money at this moment in time because of the cost of old age. They therefore want to make sure that they want to be supported and I just last week had a, this was raised by a donor to a church project that I'm working on and she raised it. She was said, you know, 'I might not be alive in five years-time. What am I going to do and we talk through the scenario. But, I think we may come on to that shortly anyway. It's a really common one particularly with even more people paying grandchildren's school fees, it's becoming increasingly prevalent.

Chris: Yeah I had one a couple of years ago and just like that they said 'oh no, I really want to, but I can't. Can I start it in two years? Absolutely you can. It's still a written pledge towards that campaign. We're building momentum, we're able to keep them in contact with them and keep them engaged. So, just if somebody can't give immediately, you know, it's not over. They could still be really supportive to you, particularly, long term.

30:36

Amy: Yeah and I think just again just to reiterate that major giving tends to be focused around larger long-term capital campaigns. It's either building an endowment fund so time is on your side to do that - or it's about delivering a building. Very rarely in our context are our major gift focused on what might happen next week, next month.

Chris: Yeah that does give you the flexibility to be able to say we're going to, you know, you can make your gift at a later stage. What we're interested in now is your commitment to.

Another one, so, 'I don't need to meet. Just send it all over to me. 'Well, you know, somebody's come to an information Event. You want to institute the cultivation process. They say they want to make a gift but when you try and set one up, they say, 'well I don't need to. Just send them in the post.' Well, as we all know, and as we've already said sending stuff in the post is not the ideal way of dealing with fundraising. Why? Because, as I think we probably all do, sometimes an envelope arrives, we open it, we glance at it, we put it down, we put it to one side. We put it in the corner of the desk and two days later we've forgotten all about it. And I'm sure, both Amy and I and all of our colleagues and probably all of you at the time have sent letters, emails, communications to people who will then swear blind they've never seen them and you know you've sent them and the only way to deal with that is to say, 'look, absolutely understand where you're coming from. You're busy, but actually, you know, I really need to come and just talk this through properly with you to make sure you fully understand not only what the project's going to achieve but what the implications for you as a donor are. So, if they can spare 20 minutes that would be great. And, we use those 20 minutes to go through the paperwork again and make sure that you can answer any questions and ideally at the end of it, complete that gift card. Amy anything you want to answer to that?

32:24

Amy: I was just going to say even, you know, let's say we still got somebody who's really anxious about the Covid situation at the moment and meeting face-to-face, online is better than just simply sending that information, because you can still talk them through it, you can still answer questions, you know, you can fix a date to speak again. So, you know even if we can't get there in person, trying to do it face to face, online at the worst. I mean, never forget that a letter, follow-up information in the post can very easily be out of sight and once it's out of sight it's forgotten about. So, this is the one I referred to earlier. You go and see somebody, you ask them to join you in leaving a gift in a will at this stage and the prospect says they'd love to do it, but they're concerned about care home fees, in-house care fees, you know. Whatever it might be there are understandably particularly in an older generation that's living longer and increasing costs of old age, they're very scared to make a commitment and that does need talking through with every and trying to find the right Solution.

33:34

So, how do you overcome their worries? Well firstly, again, 'thanks' is the most important word in all fundraising. Thank Them that they're considering making a gift, otherwise they wouldn't be raising the question. This is not an excuse to get out of it in our experience. This is not somebody using it as an excuse not to make a gift. It's somebody genuinely concerned that their gift, pledge, their commitment, might not be able to be fulfilled or that they can't make a gift at the level they would like to give, because they're nervous about what money they make in the future. So, in many ways it's the perfect

opportunity to discuss a legacy gift to be able to say to them, 'look, there are many ways to support this campaign. Perhaps you would consider making a legacy gift?' It might equally be a way of saying, 'well, you can make your commitment now but we'll provide you with - and this is for you to do - a set of words that you can give to your solicitor so that in your will, you know, that your gift will be honoured. And, I think, you know, in my experience, I find that incredibly comforting to potential donors who really want to support but are nervous about what's going to happen a couple of years down the line.

34:45

So, be prepared to go in and make sure that they know that by consulting with you, but also by consulting with their solicitor or their accountant or their financial advisor, that they can do that. They have different options available to them whether that's a legacy, whether that is a codicil in the Will that just makes sure that any commitment is honoured, but they then are reassured that everything is at hand and they therefore will be inclined to sign on the dotted line, for one to the better expression.

35:14

And, ultimately as fundraisers that's what we're trying to do. Is to get their commitment out of them in a way that suits them and I think it was mentioned in the last webinar and I'll say it again, you know, philanthropy is a matter of personal choice. We are not forcing anybody to give here and we're certainly not forcing people to do things that are outside their comfort zone. Whatever we do as responsible major gift fundraisers, we have to do it in such a way that they are reassured, secure, comfortable with both the level of their gift, but also the use of that gift and how that gift might be fulfilled. So, in this particular instance you're not being played, you're not being callous, what you're doing is offering solutions, offering opportunities. And as I said, I had one just last week with an elderly lady who wants to support the church she's been a member of for many, many years, but she understandably is a little nervous that now she's willing, she may not be able to fulfil a five-year pledge. We've therefore provided her with a short set of words, she's forwarding that onto a solicitor, it will go into her will and she therefore can rest assured that her commitment will be honoured.

36:18

Chris: Yeah, I think it's really important as well with legacy fundraising, think about reminding the prospect or the giver of the impact that their gift is still having now, even though you're not receiving it yet.

36:30

Amy: I love legacy fundraising. You people who've been on our webinars will hear me harp on about it all the time, but legacy fundraising, exactly as Chris said, is about being open and honest with the people you're asking for money and making them feel reassured. So, we quite often as well hear, 'well, why do you need to know about it now? I'm kind of hoping I don't die for a good few years.' Yet and that's that whole point, it enables you as an organization to plan, it enables you to continue talking to that donor about where the gift will be directed, how it will be spent when it does arrive. And to thank them while they're still here, which is absolutely critical. So, yeah lots to think about with legacy fundraising. We did do a separate webinar on that if people are interested

37:20

So, moving on then into building long-term relationships. We had a question on the last webinar about this, about kind of stewardship and it's so, so important when we've been asking for money, you know, whether that's been major gifts or much lower-level gifts, that you continue to build relationships with your donors. How many times, you know, have we heard, Chris, 'well, this person gave to us 10 years ago and now they don't want to know and it's because she's not spoken to them for 10 years.

37:53

We mentioned it in the last webinar as well but super, super important that you think about the long-term planning of your relationship building. So, when you are planning stewardship campaigns, think about what's appropriate for your donors and for different constituent groups. It's very, very different about how you keep people engaged. So, really do that work as you plan your engagement programs, your recognition vehicles, whatever you're calling them and make sure they are appropriate for your constituent group. Quite often in surveys that we run for clients to their supporter base, we ask lots of questions about how people would like to be recognized and what they would expect if they were giving x to y and what have you. People often are confused about why I'm asking that many questions but it's really important because nine times out of ten a simple thank you or a handwritten letter from the leader of the organization is what somebody wants. They don't want, you know, plaques, certificates and everything else that you've dreamt up. They want something really simple. Sometimes, of course, bigger, you know, recognition or clubs etc, really work, but often for many it's just a simple personal thank you. Knowing that can also save your organization a lot of money in cold hard cash terms and producing things but also in the time it takes to deliver recognition like that. So, so important that we that we build on that and keep in touch with donors.

39:33

Chris: Just to touch on that one, one further away. Sometimes, some donors can be very self-effacing, very modest, you know. I don't want a fuss made, I think it's also very important to set a baseline for stewardship. So, again, a story of a long time ago working with a cathedral where there was a lady who'd been incredibly generous and she was known around the community of being probably the wealthiest person that was part of the cathedral's community, but she was one of those lovely ladies who sort of said I don't want to make a fuss, please don't make a fuss. Trouble is that they, the cathedral, then took it to an extreme and they had a big concert with royalty attending and it should have just been automatic that she as a donor, particularly a major Donor, should have been invited. But, because she had once said in passing to the Dean at the time, "Oh I don't need a fuss," they decided to leave her off the list entirely and as a result, when we then came to the next round of fundraising and she was very clearly going to be a pivotal part of that, she understandably was a little bit reticent to get involved. We had to spend quite a lot of time winning her back over and it was as simple as that. So, I think, you know, when you look at stewardship, looking at both ends, what's the minimum that you should be doing automatically? And what's the most that you think a particular donor would tolerate?

40:52

The other factor in that, and this comes back to the book, you know Amy rightly said that even if they say they don't want a fuss they do at least want to know that they're being appreciated. I went into a study interview two or three years ago for a school that is a fantastic fundraising school, very well led and the first thing the guy said to me was, 'I've only agreed to see you because I gave a hundred thousand pounds to the last campaign and I'm not giving anything to this one.' The reason for that was he didn't feel that his gift had been appreciated, not through lots of praise in public, but what he would have liked would have been to, you know, meet with the head a couple of times, had conversations about the way the school was going, maybe given a platform to make a few suggestions about things the school might do in the future. They didn't do it and he therefore went off and started supporting other causes where he was giving large six and in one case several million figure gifts to another cause - and the school would miss that because they just

sort of overlooked the basic fundamental of a major gift, giver, is they want to be engaged. They want to be involved. So, make sure they are.

41:57

Amy: Yeah definitely. it's similar to another story from last year when I was working with a health charity and spoke to a chap who really was engaged and I said, 'can you give any advice? Are you happy with the way the team communicate with you?' And he actually said. 'I'd actually like to know a bit more about kind of forward planning in the master plan, so if something really appeals to me, I can plan my giving in for the future,' which is fantastic to hear. Somebody who wants to know, 'I know you're going to launch that in 2023 and that's right up my street so I'm going to allocate my major gift for that year.' So, it's all about that communication, isn't it? And all about as well saying thank you, as Chris says, but saying thank you to different groups can happen in very different ways and this infographic just demonstrates that. So, for major gifts, it's about that personal thank you by the right person. Online and community can be much different and it can be you know simple letters or emails but we can also be creative with that. We've spoken about it over the last year, we've seen some brilliant examples of really simple, you know, kids at school writing the Christmas cards to alumni to say thanks. Simple things like that, that make it just a little bit different.

43:12

Trust sand foundations is challenging. Sometimes, you can have correspondence, sometimes you can't, but in addition to that, accepting a grant letter, you know, a personal note from leadership, really helps. A charity I'm involved in, our chairman writes a quarterly report to all the funders who support us. Just with an update, no ask, just an update of what we've achieved in that quarter and they love it. They really appreciate getting that continual knowledge.

Legacies, obviously, as we say we've just discussed. Really important and let's say thank you now while people are still here. And corporates, again, very different. Sometimes, a thank you for corporates can be in what they get in return in terms of publicity etc and that's absolutely fine. So, again in terms of how we communicate with people, think about how we say thank you as well, because it can be very different for different groups. And Chris just to finish us off on some good communications

44:09

Chris: Yeah, So I mean I think that everybody is different. You all have a different constituency, you will have different types of donors, you know. You've got to make sure that whatever you do is tailored to their particular needs and, as Amy said, there's been some wonderful examples. I particularly like the one of the school kids writing handwritten Christmas cards to those alumni who had been supportive of a previous campaign

Amy: And that wasn't even an ask, was it Chris? But they got lots of gifts from it.

Chris: It was just a very simple, you know, 'I hope you're well.'

It was just a really nice way of doing it and I think again, something else maybe we need to remember in the 21st century and particularly after the last 18 months and I think we can all reflect on this, you know how, much direct personal posts that we get that is actually nice. I mean most of it is bank statements and flyers and you know whatever else. It might be every once in a while it's nice to get a letter, it's nice to get a card that is handwritten and actually it's hard if you're a one-man band operating without the assistance of school children to write notes or whatever - but that personal touch should never be underestimated. So in terms of good communications, try and factor some of that in. It might only be 10 people a year who are your most important potential donors or existing donors but it might be 100 alumni who are incredibly important, in which case you need a bit of support from those in the school to help you do it. It's the personal touch goes a long way in cementing a relationship and I think within your communication strategy keeping it as personal as you can to those major donor prospects or those existing major donors is absolutely fundamental to a good stewardship program. Clearly appropriate recognition, you know, how are you recognizing people? Not everybody wants their name shouted from the rooftops but at the very least, you know, as long as they don't want to be anonymous, just every once in a while being able to recognize them on a website or a newsletter you'll have all seen in annual reports from fundraising organizations long lists of those who support. I know from both my when I get this stuff from both my school and my old university college out of interest, I look and see who has given and it wouldn't surprise me if at some point, I'll think, oh crikey, you know, my old best mate gave. Maybe it's time for me to do something as well? It's that sort of little reminder just helps both to reward the person who's given but also maybe prompt others to be creative. We've just talked about in the context of the school kids, attrition rates, you know. We now know how many emails are being opened, we can tell what's going on if there's a drop off in any area. Maybe you need to work out how we can address that and that may well be to go back to the written element of communicating.

46:50

And let's learn from the pandemic and by which, I think we all mean that you know whilst it's been a difficult time for everybody there has been quite a lot of good news over a period of time. Let's keep pushing those good news stories out to people and let's make sure that we're able to use whatever technology we can in the modern world that people are now more comfortable with, to make sure we are communicating strongly and regularly. And I think, the regularly bit is very important. That we make sure that we without overdoing it, as Amy said, it doesn't always need to be about asking. It can be as simple as, this is what we've managed to achieve and we wouldn't have been able to do it without the support of our generous donors of the past.

47:29

That just keeps fundraising at the forefront of people's minds and as we all know, if it's at the forefront of people's minds it makes the cultivation process subsequently much more easy.

47:41

Amy: Yeah it's so, so important to get this right. I spoke to a former colleague of ours this week who now is director of development at national charity and they have made their annual fundraising target three months ahead of schedule this year. And it's because for the last 18 months, they were absolutely fantastic about the way they communicated with their donors, about the situation they were in, about what they were doing to get out of it, about what they were still going to deliver - and it's, you know, it had the best effect it could for them. So, get this right and it's a game changer.

48:16

Okay, shall we see if we have any questions in Chris?

Chris: Well, we have one Heidi and it sort of links. I think we may have touched on it a bit but Heidi's question is in point four today;

"it is suggested that I declare my own gift. I work in a school, my salary does not allow for a major gift, how do you handle this aspect if you give regularly but not phenomenal amounts? Is there such a thing as a gift too small that it shouldn't be mentioned?"

48:41

My answer to that is absolutely not all. Gifts are valuable, you know the tale of the widow's mite applies here. The reality is that you are demonstrating your support for something and as we say over and over again, philanthropy is a matter not only of consideration and choice but it's also dictated by how much we can give. I'm sure we would all, if we had the money, like to give more away but most of us don't, so therefore we give what we can afford. It's the fact that you have given that becomes important, the fact that you have already demonstrated your support for a cause should encourage, does encourage other people to want to do the same. The reason we talk about declaring a gift for major donors, particularly when we're talking peer-to-peer - and Heidi that was the point I think - the advice we give here is more about you briefing your volunteers than you yourself. If that's the situation you find yourself in. But we do know, time after time after time, that people are likely to give at the similar sort of level to the gift that has been made by the person who's asking them. Now it's slightly different when you're a professional, you know, when you're the professional working. People will understand it's your job to go out and secure the support, but when you're talking about volunteer leaders, volunteer askers, their level of gift will influence somebody else's level of gift. But, coming back to your final question, is there such a thing as a gift too small that should be mentioned, no. All gifts should be recognized, all gifts should be mentioned because people will understand that momentum of support is gathering behind a campaign and that is absolutely crucial.

50:15

Amy: It's the same when we talk about trustee boards giving. So, within a trustee board, you will have very different levels of wealth generally across the trustees and I always say, you know, it doesn't matter if one person is giving a pound a month and another person is giving a thousand pounds a month. It's all relative and it is about, as Chris says, making a commitment to give and doing what you can and then we say, collectively the trustees are supporting this to the tune of x. It's such a powerful message and so, yeah, it's not about what you give necessarily, but about the act of giving itself.

50:52

Chris: Absolutely, I've got no more questions to come. With any other questions if anybody would like to type a question in or can't say we've answered that one. If you do, please type away. Everybody's very quiet. Well, either we're doing our job properly or I don't, you know, I think what we should say here is, if people don't want to ask questions now, do please feel free to email questions into us. We'd be happy to try and answer them as best we can, you know, that's what we're here to do. It's not always about assignments for us. We like to think that we're here to help people.

51:41

Amy: Absolutely, so we touched on the book itself earlier, so my details, Chris's details are here on the screen but the Gifted Asking book that we've just been reviewing in this session and the previous, please do take us up on your free copy. If you need a copy for colleagues, just let us know by emailing Julie at the details here, with your address and what have you and she will pop them in the post for you.

52:08

Chris: And so, Amy, we have just had another question. 'Please can you run through what a pledge, gift card is?'

52:14

Thank you Susanna for that question. Well, you know, we sort of have a standard form of gift card that we would recommend to all of our clients when they're in campaign. So, it is a gift declaration. It lists, it enables a donor to declare how much they want to give. Overall, it gives all the relevant information. It may well include a standing order form if the gift is going to be pledged over a period of time. A standing order form that is bank compliant that will say what day of the month the gift's going to go out, for what period of time, whether it's going to be monthly, quarterly, annually. You need to tailor it clearly to your particular campaign, but it's very important and the final thing, of course, it must also have the gift day declaration on it for those who are able to declare themselves as being eligible for gift aid. Then we always recommend to most of our, to all of our clients is, you know, store them alphabetically just in case one day HMRC come along and want to do a gift aid inspection by which case what they normally do would be just at random take 20 such cards, declarations and make sure they've all been done properly. So, it's an A4 document, normally printed on a card that sets out the name of a donor or names of donors, you know, address details that sort of stuff. What the gift is, whether it's dedicated to something because some campaigns may be multifaceted. It may be music, fabric, whatever but it gathers all the core information that you need on one page, on one sheet then is signed by the donor. The record is kept, it's stored in the campaign office and forevermore you know what that gift is going to be.

54:00

The benefit of that, as well in addition to the obvious audit trail of papers, is that once somebody has been through that process of signing their gift card and returning it to you, they commit to their gift. So, clients often worry about pledge periods and say, well you must have had situations where people have just decided not to pay and it's very, very rare. Once people have committed and given you that pledge card, 99% of the time they see out their gift. It's almost like, you know, by handing it over to you, they're declaring their commitment. But, for them it's putting themselves in it. So, it has multiple uses.

54:39

Amy: Absolutely and conversely very often the people who say verbally or might send an email saying this is what I'm going to do for you, they won't get around to signing the gift cards. They're the ones who eventually will drift off and you'll never see the money from them. This sort of psychological act I guess. It's not a, you know, it's not a contract but perhaps it feels like one when you sign it.

55:04

So, that's what it is. Hope that answers the question Susanna. Any final questions before we close? I think that might be everybody. That's everybody done. Well, over to you to say thank you. Yeah, thanks ever so much for joining us once again. Like I say, we'll upload this onto the website in a couple of days time. Any other questions get in touch with Chris and contact Julie for your books and we hope you're all well and have a really good fundraising period in the run-up to Christmas.

55:35

Fantastic. Take care everyone. Take care everybody, goodbye.



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