

Gifted Asking | Getting ready to ask

Tues, 911 02:00PM • 36:35

Hosts: Amy Stevens and Andrew Day

Andrew: Welcome everyone.

Amy: I know we've got some familiar faces although we can't see you but you can see us, today, some clients and some friends of the Company and also lots of people we don't know so welcome. We hope this is useful and we are recording the webinar as always. It will be available on our website in a couple of days to watch again and share with colleagues. Questions we'll do at the end if that's okay so try and pop everything if you can in the Q&A. we sometimes miss it in the chat. We'll address those at the end of the webinar. So, this webinar, well it's a series of two actually, Gifted Asking.

00:54 So we have our new book Gifted Asking which is about the process, funnily enough, of asking for money effectively. So, these webinars split in two parts; the first part today is getting ready to ask, which arguably equally as important as the ask itself - and the next webinar which I think is next week isn't it Andrew? Or the week prior and details are on our website...is about the actual ask itself and how to close those gifts. So, we are trying to basically demystify the process of asking for money through these two webinars and make it a less scary experience, after all.

Today we'll look at the motivations behind giving, the cultivation process and actually what you need to have in order in order to begin asking. So, things like gift policies and other things that you might need.

01:58 First of all thinking again about gifts, the difference between a donation and a gift. Those of you who are either, clients of ours, or have been to our webinars, will have heard us talking about this before. Seems like semantics but there's actually a big difference between a donation and a gift as we highlight here. So, donations tend to be reactive and therefore lower in value and are often given due to pressure of you know feelings of guilt etc. You know, the standard stopped on the street and asked to make a gift you're going to give a donation, a token donation. A gift is something that is much more considered and generally comes through personal feelings, a belief in the cause and therefore is always higher in value. And the importance of understanding that difference helps us when we're thinking about securing major gifts for that for our charities - and understanding where donor's motivations are coming from enables us to think about how best to approach them and therefore to secure a gift and not a donation.

03:13

Andrew: Hi, yeah well Amy you're spot on in so many ways if I could just recap there - a gift is something that's really considered. If you think about a birthday gift or a Christmas gift, you know, you go out and you select it for that particular recipient. It's for a purpose. You wrap it, you know, you decide when you're going to make that gift. It's a very thoughtful act. A donation is more a reflex. It's something you do when someone puts a bucket in front of you or asks you to. you know, at a tube station. So, it's a very different response you're asking for and in so many ways then when we look at when you are when you've set about asking properly, what you're really doing is engaging with people and encouraging them to reflect and act thoughtfully about their giving. and therein what is a major gift, is a common debate, across many clients and yes, the answer is of course - it's not about the size of the gift. It'll depend on the organization as to how you class what a major gift. It is really about the impact and a major gift can be a thousand pounds for one charity or a million pounds for another, so it's important to understand that those major gifts have the capacity, their importance is to transform, to actually help you and your organization make that that step change so and this is what drives the whole approach behind what we've described in in Gifted Asking. And, I should just say this was our lockdown hobby, wasn't it Amy? Apart from learning how to do webinars, we decided, hey why not let's write a book. So, it is of course a matter of personal choice, who and what you give to and when. It has absolutely no correlation with the amount of money that you've got. It has everything to do with, if you like, your motivations and the reason for giving. It's not just a question of t being the most emotive case, having the most emotive case, it is about having the most urgent or compelling case that that will drive and bring forward major gifts and be transformational gifts for your organization.

05:31

Amy: Yeah I think that's right Andrew and that point of what is a major gift, as Andrew says, for different charities, it means very different things. It could be five thousand pounds as a major gift in your organization. For others, a hundred thousand, but the process of securing those gifts is exactly the same. And that's what we'll go through here.

Andrew: So, here we are some motivations. There are many more listed in the book. Obviously the altruistic approach, to help others to give back to society. And we would we all like to be so brilliant, but when you really, really scratch, it's not always an altruistic response that generates or drives major giving. It can be things like recognition and there, cultures are different so, you know in a North American or U.S culture, it's very much around how big is my name and, you know. I've been staggered about the size of some of the plaques on university buildings for example in the United States, but here the recognition in the UK is often more subtle. it's more that you would like others to know but you don't want to be too loud about it. Or you want in your particular circle to be part of that circle. So, you see things for example like almost clubs or fellowships or groupings of donors who are like-minded, who'd like to hang out together, who have a shared passion or interest in your organization. Sometimes there's things like self-interest plays a part where people benefit with a classic case in point, when Chris Goldie and I ran a campaign for a church in Notting Hill in London and people gave to that not because they attended. Many of them never came through the doors - it's because they were in the big houses around the church and looked at it and could realize that frankly the roof falling in devalued their properties. Self-interest, on the other hand, can also be because of a strong conviction or personal belief. Whether that's religious or for political reasons or even as we're seeing more and more, for environmental reasons. At the moment, people are passionate about bringing meaningful change for environmental causes and are prepared to help fund that. Sometimes, too, there's a degree of reciprocity. you know, I asked you, so you can ask me, you know, as paying back favours to friends and colleagues or winning favours sometimes with friends and colleagues if you get in first. And equally, genuine gratitude can be a very strong motivation for giving and not just to the institution that's benefiting from the gift but also to the person possibly that's asking them. So, you see that sometimes in schools where alumni might come together to recognize

a former member of staff a teacher, or a coach or whatever and choose through a collective gift to recognize their contribution to that particular school community.

Guilt plays a part often, interestingly, when people make a surprise or large amount of money, business sales, things of that sort but also, obviously when there's national disasters, when there's poverty, when you're dealing with homelessness and so on - and you reflect and think how fortunate you. But, I actually think the big driver with guilt is when people have to deal with having more money than they feel they probably deserve. They won't say that, but it does, you know, if you reflect in your own way sometimes you think gosh I really didn't work as hard for this as somebody else or I've had good fortune in my life where somebody else has not - and I need to stand up now and support and make a generous gift, a big one.

Though probably the biggest one in my view is beating the tax man. How often do we need to as fundraisers, explain Gift Aid, even to those who are financially very savvy and particularly at the higher levels for the 40p and 45p tax payers. People like to be able to ensure, to have their gift generate further support and the message that HMRC could be writing the single biggest check to your capital campaign, if everyone signs up. Gift Aid is a really, really powerful motivation for people giving as generously as possible and particularly pledging over time. Absolutely. So, these factors are all really important in the pre-asking phase, to understand what is motivating that person that we're going to ask or indeed send somebody else to ask - and it helps us to build out what that ask will look like, you know, what they might be offered and how you pitch that approach. And then we're just going to look at three sectors in a little more detail that that have some quite obvious differences when it comes to motivations.

10:25

Amy: So, I think this is a 'Director's Take' from the book Andrew on health.

10:30

Andrew: Yeah, well I think it's really interesting. You may have gathered, I'm Australian and one of my early campaigns that I actually did a feasibility study for, that we ended up running, was for a former client who, many years earlier, was a care home in in central Queensland. Now these are, you know, key institutions in the community in these in these rural towns and a focal point for lots of ongoing fundraising activity. But in the study, I assumed that you know people would not want the same type of recognition that had been done 20 years earlier when the firm I was with had run the campaign to start the care home. Literally it listed on the boards the name of every single donor and the amount that they had given to form that care home and I was quite taken aback, thinking, you know surely that was the old way and we need to be much more subtle in our recognition. But, they were not having one bit of it. They wanted to show which families had actually done better in the last 20 years than others and there was a real competition going along. Well, I am a fundraiser at the end of the day and that recognition was a really powerful driver for raising that target. So again, just be careful about the preconceptions you bring into any campaign - that although different, are the same.

11:58

Amy: Yeah and I think that teaches something about recognition as well. So, as we're planning fundraising strategies and what have you, just remember that recognition is different for every organization. For some, you know the donors really um - I think as well with health, we often see a lot of thank you gifts, so those grateful patients giving back for treatment or for care of loved ones, which we see frequently. Religion is another one where we see really strong belief in the cause and driving major gifts - and again particularly within a faith setting. Major gifts can mean different things to different, so you have people who, in a total gift may actually be giving a small amount, for them that is a huge sacrifice, real sacrificial giving and tithing percentages of income. And, I'm seeing this really strongly at the moment with one of my clients in Bradford where we're dealing with different faith communities and how each one of those reacts to the project and want to give so, religion is a real driver for people, giving what they can in a sacrificial way for the faith that they believe.

Likewise in education we've actually seen a real change in education and major givers in the last few years, younger major givers are really drawn to supporting people rather than facilities. Yeah, so we're seeing really strongly that bursary programs are doing really well in the education sector.

People giving back to people, a paper that came out last year about next generation giving and how the different groups are kind of giving to different areas in different ways. So, you know it's all millennials, generation Z and then matures and what have you. The matures, by far, still give the largest gifts but tend to give to more traditional causes. So, faith causes, health is up there for all age groups, military causes like that. Whereas the younger givers are really keen on kind of social causes and homelessness, the environment, young people etc. A really interesting paper to read if you're interested in that kind of difference in giving.

14:35

And it is important because that kind of knowledge helps us shape the way we market to those major givers and how we direct our approaches. So, it is an important thing to think about. So, in preparation for asking there's two things really we need. Two sides of the coin we need to look at. We need to look at who are we going to ask, you know, identifying those prospects who are going to ask for money and doing that careful evaluation. And we touch, well we don't touch it, we look at it in detail in fact, in our earlier book, Gifted Fundraising - about prospect evaluation, how we know when somebody is ready to be asked, you know. Do we have access to the person? Are they interested? Do they have the capacity etc? So, that's one side of it, the person themselves thinking about all these things. We've discussed the motivations for giving etc.

15:31

the other side, before you ask, is making sure your project is ready, be it capital, whether it be revenue for a hospice or hospital, whether it be a bursary program. It's having that clear project plan, what you're raising money for and why. So, testing the feasibility is incredibly important. Andrew's going to talk about that on the next slide, setting key timetables and milestones, making sure you've got support to deliver the program, having all your materials in place. This is all really, really important so that you don't jump in and you ask people at the right time, in the right way and therefore have the biggest chance of success.

16:16

Andrew: So true. So, a great place to start is with the feasibility study. It's really important, as just to remind you, particularly if we're talking about major gifts or capital campaigns, our target, 80% of it is going to come from 20% of the total number of givers to be approached. So, in setting that target and it's really, really important that you undertake some early research and try and engage what those potential major donors to get their views on what's proposed, but more importantly to understand motivations, to understand networks and improve the prospects for success with your campaign.

17:01

So, here are the seven steps, of course, of a feasibility study stretching through the initial research, getting that case statement prepared, breaking down the target and understanding through a scale of giving how best to achieve it over a pledge period, allowing for tax benefits then moving on to preparing an interview list and a timetable because these studies have got to be done in a timely way. They can't go on forever. Arranging and booking those interviews and sending the information beforehand to those key people, to being engaged then actually conducting those personal interviews. I still like doing them face to face, but zoom certainly makes life a lot easier when you've got travel involved. But there's a lot of desktop research to be done at this stage as well. Then bringing that all together in a review step, collating your findings, testing some of the conclusions. You may even want to do an online survey with a wider constituency at that moment. Getting into the final straight now, prepping that draft report, consulting on it, reviewing and finalizing it – and then of course presenting it and getting the broad buy-in that you need. So, it's a key process but it really gets you much closer to your major donors and to understanding their motivations for giving to your campaign.

18:22

So, now you do the other parts. It sounds so obvious but it's really around whether or not you've got the resources to deliver the project and who will be the actual project lead. So, these key considerations are fundamental areas for research in a study. You need to understand where your ambassadors or advocates might be. That will help you access these networks to raise the money. And, really where does the project fit with your values and vision for your organization? Is it genuinely urgent and compelling? Will it excite your prospects to give at a level, that is, possibly a once in a lifetime level? And, to enable it to happen. Ultimately it's about the long-term sustainability of your organization. If it's a nice to do, if it could happen if people gave to it, it probably is not going to excite your major donors. But if it is genuinely going to make give you a step change in the way you operate and the way you achieve your charitable objectives, that's exciting - and that's what brings major donors to the table.

19:35

Amy: Yeah, I think that sustainability element is really important isn't it? a lot of the funders, the grant makers but also, you know, Philanthropists, want to know that the gift they're making now is still going to be making a difference in five years-time. So think about you know, your organization and your operation and make sure you are balancing that and people have an understanding that you are sustainable in the long term.

20:01

Gift policies, Andrew

20:03

Andrew: Well, this is about good housekeeping. Basically, before you get asking, understand who you're prepared to receive gifts from. Don't have the awful situation which happened to me - can I share a story here, Amy? Years back, it was a cathedral campaign in Brisbane, my hometown. That's St John's, if you know it, we were raising 25 million dollars to finish the cathedral. In the end there was this beautiful rose window to be built and more recently a new casino, the first casino, Jupiter's casino, had opened on the gold coast and wanted to make a million-dollar gift. They wrote a cheque in fact for a million dollars to name the window 'the Jupiter's casino rose window'. I think they thought it looked a bit like a roulette wheel, Amy, and that was the connection. Anyway, very prominent. In fact, it caused the church a great deal of difficulty because there we are, taking money essentially from gambling and some of the difficulties that gambling, social difficulties that that brings on. There was a full synod or parliament meeting. The cathedral was packed. I remember the cheque sitting on a plush cushion, literally on the main table as the debate was raging as to whether or not it should be accepted. I have to say ultimately they did accept it. They used, I think, some of St Paul's phrase - so the money will be washed clean by its use. I've used that particular line a few times since, I might add, but they managed to take the million dollars. No surprise I guess, but if they'd had a gift policy we would never, ever have had that problem. We'd know that there were certain things and we do today know for certain organizations, tobacco companies, breweries, you know, not on. But maybe to their, you know, carbon producing industries, the oil giants, you know, the Sackler foundation. There are lots of you know, certain families possibly even around the world are in certain communities and you may not wish to take money from. Have that debate first and put it in your gift policy. But move on and then consider, what is the appropriate form of recognition? Will you allow particular parts, if you're doing a new building, to be named or scholarships or bursaries to be named? How are your gifts then going to be administered? What degree of confidentiality are you going to afford?

22:28

Back to my example about that Queensland care, you know, are you going to list the amount people who are giving in the in the book of thanks? Is that what you've got in mind? Have those arguments amongst your leadership group. First agree the plan and that way you'll present a really clear and consistent message when you're going out and asking.

Amy: It even goes as far as kind of ethical investments, as you touched on there, Andrew. So, if you are you know planning an endowment campaign for bursaries or anything else, think about your ethical investment policy and where your investment managers are investing on your behalf because people can ask questions of you in that sense and you should not be able to say, you know, that you are not, maybe, you know investing in certain areas or not.

23:27

So, again in that process we have our house in order, all our documents are here, we've got a gift policy, we've prepared our campaign materials and we have our prospect list of people who we are going to approach. We then start to think about cultivation. So, getting people to the right stage to be asked. Cultivation events - these can happen in many different ways. Mass information events in person are still you know a bit of a moving feast at the moment. So, some organizations are holding big events and I've heard of a few galas from some of the major charities this week. They've gone really well which is fantastic to hear, but for others, dependent on your constituent group, dependent on people you're inviting, may be more nervous, particularly with the winter months coming. So, we need to think about hybrid events and if you've joined, we did a webinar I think a few months back in the summer, wasn't it Andrew? About hybrid events and how that can all work with the different creatives that you can use. So, it could be iPad buddies, one person's there in person, the other person is at home, taking each other around the event. Online events are becoming increasingly popular. So, I did a feasibility study for a school this summer and it was so interesting because the old girls from the school are now spread around the country and actually a number of them said they feel more engaged with the school now than they ever have, because ordinarily they can't travel to events in Manchester and, you know, some of them live in the south and they can't get there for an

evening event. But they've been joining the online events and they're up to date with what's happening, they've been able to ask questions in chat rooms and what have you and actually feel really engaged. So, I think actually the forced movement to online events has taught us a lot in how we can deliver both in-person and online events.

25:31

So, these cultivation events are about informing people about your project. Remember this isn't about asking for cash on the night, in terms of get your chequebooks out, because then you'll get donations. We'll only get gifts if they're informed about the project, they give you permission to follow up with them afterwards and they're asked in the right way for the right thing by the right person. So, really, really important and here's just a diagram of how we run either a virtual a hybrid or an in-person event even. Really plan your event. So, think about the location, think about the timing. Is it going to, you know, don't make it too long. People are very, very busy nowadays. They've suddenly got much fuller than they were this time last year that's for sure. But think about the event. Obviously make your invitations in both personal phonecalls, meetings, emails etc

26:40

Think outside the box about what you're going to deliver. How can we make this event interesting? Something that people want to be at? Is it the speaker, you know? Is it something quirky that's happening at the event? And then like we say, deliver that information. Tell people about the project. Inspire them about the project and then later follow up on that. And then there's the feeling ready to ask. So, we're almost at the stage where we're going to be asking people for money and this is a quote from the book. You know the responsibility for making sure the person that is asking for money sits with us as fundraisers. So, with us, you know, myself and Andrew who are working with clients - but also those of you who are online, who are, you know, directors of development and what have you.

27:29

we need to make sure we're giving people the tools to ask for money effectively. So, it might be that you're asking your chairman of trustees to go and ask Mrs money for a gift. Make sure they're prepared, you know, do they have the answers to those frequently asked questions that are going to arise in these meetings?

27:50

Have you prepared that plan of what this person wants? What motivates them? what are we asking for? What recognition might we offer? Do they have information about tax effective giving - and we always say this - we are not tax experts as fundraisers. We know what gift aid is, we know what tax relief is, we know that gifting shares is really tax effective. We're not there to work through people's financial management. Giving people that basic information allows them to ask with confidence and make sure you know all those other things that you need, a gift card when somebody says 'yes I'd like to make a gift. They need to have a piece of paper to document that and make sure we know who's giving what and when, especially when gifts are pledged.

28:37

So, really important that all that background work is done and anybody who was going to ask another for money is as prepared as they can be in order to get the best result possible.

Amy: So, then just another little snippet. One of my former clients, about the importance of motivation and personal belief, this gent that I went to see. we were going for a big money ask. It was for a cultural project, hugely important in the Indian community and it was one of the easiest tasks I've ever done. He literally said listen, you know, I'm here to talk to you about this project. We really need your support and he said, yeah I will pay for it. This is my accountant, you can chat to him later, but let's have a cup of tea. Which for a northern girl like me was fantastic just to be invited for a chat and have one of the easiest asks I've ever done.

29:38

But the method, the story behind it is that he didn't need the sell because that project was so important to him. He'd already made up his mind before I went to ask. He was going to invest in the project because it meant so much to him and that really highlights that, you know, the donor's belief in the project is so very important for obtaining major gifts.

30:05

Anything to add Andrew, before we go into the question?

Andrew: But, also if I remember rightly, he was so excited at making the gift, I mean, it really was like it was a birthday gift. He thought about it, it was wrapped, he'd chosen the moment, you were sat in a particular chair, it was given to you, you know. He meant it to be really special and he was so excited and pleased to do it. I think that sometimes we've got to remember that we've got to be good at receiving gifts. Not just, you know, encouraging people to give them. As fundraisers, we need to understand and help our leaders to receive gifts well, because if we can do that then people will give again.

30:51

I'm going to tell a story now. I remember one situation where I actually made a gift to my local church. Julie and I thought about it, we really prepared, it was a major project for the church and it was for the hall - and we wrote the cheque and I gave it to our priest at a PCC meeting and he was sort of looked at it and said 'thank you very much', and put it in his coat pocket. I didn't hear anything for months. I thought, okay, I bet you it's gone to the dry cleaners and the cheque's been put through the wash or something like that. But no, he just didn't really know what to do and he didn't say thank you and I felt really awkward. If you reflect, if you've done that, if someone came to you with your Christmas present this year, Amy and said 'Amy, here you are. Here's your Christmas present, but maybe it's a week beforehand and you just put it under the chair or put it to one side and never said anything, you'd feel you would never do that. You might say wouldn't, you know, can I open it now or should I leave it for Christmas morning? Do you see what I mean, but you receive the gift and I think what happened to you there is you received it well and, wow, how exciting it was for him, how affirming it was. I think receiving is really important we often forget it is and I think in our next webinar, we touch on saying thank you don't we? And how you know how important it is and how to go about saying thank you to different constituent groups and how that affects your long-term capacity you know. How many times have we had organizations come to us who, you know, people who've previously given them large sums of money are absolutely furious because they gave to a campaign, they didn't hear from them for five years and then they've been asked for money again.

32:41

So, thank you doesn't just end with thanking for that initial gift, it's a long-term process and it's a relationship

Andrew: It's stewarding and it's not just a letter.

32:51

Amy: Absolutely, absolutely. So, do you have any questions Andrew in the q a or the chat?

Andrew: Everyone's been very well behaved and quiet or otherwise I'm disconnected. Oh, hang on, Steve Hasler has come in. Very good.

33:05

Amy: Hi Steve

Andrew: Steve's question, Amy, to us is, "are you going to talk about stewardship of our funders next time or can you comment on it now?" What's your thoughts, Amy?

Amy: Well, we can do both. It is in the next webinar, that's when we talk about once you've asked for the gift and they say thank You. Exactly as I was just explaining. How we go about, then continuing to engage them. So, Steve, with regards to the almshouses, you know, that's these recognition programs that will run and engage people s in the long term, so even after that capital project has finished, hopefully, you've built a community of supporters that you can continue to engage for the longer term.

Andrew: Yeah, yeah, and there's a bigger prize there Steve. I mean we've seen it where people have come to the end of a pledge period from a campaign. For example, very often if they've got a standing order in place it just keeps going and the trick is to keep thanking them - and encourage those who standing orders are coming to an end, to continue that giving. It means you've got to refresh your case, but they're already committed to you. It's so, so much easier if you time it right and you've stewarded them properly and they've been giving at a major gift level. So, yeah, okay Amy, we have an anonymous attendee, "how do I get the book?"

34:34

Amy: The book is on our next slide let me skip along. Yep, I'll leave that on the screen while we do the questions. Contact Julie there's her email address is on there. From later this week you'll be able to order the book online, but contact Julie and we will pop a free copy in the post for you.

34:55

Andrew: it's not exactly you know super heavy and I wouldn't recommend it as a Christmas gift or bedside reading but it's a good pamphlet to dip into and grabs all of what we've just shared in this webinar and next. Doesn't it, Amy?

35:08

Amy: Yeah. So, yeah get in touch with Julie and we'll get those in the post to you.

35:14

Andrew: Yeah. Can I also just mention, Amy, that this is a really, really good time to be asking. This is the season of giving. This period through till about mid-December, is when people are leaning forward. This is the time to engage, for all sorts of, not just for money, but to get people involved. To think about next year. Get you know your visionary plans. This is a really good time to ask. A not so good time to ask is January. People are paying their tax bills, they're tired, they're, you know, a bit grumpy. Well, I am anyway mid-winter. I start to wonder why I'm not back in Australia, surfing, but I think it's a really good moment just now. Coming out of Covid. As well people are incredibly grateful. I'm very grateful for the opportunities have to connect. So, don't miss this time. This is a good time to get your asking underway,

36:13

Amy: Definitely.

Andrew: Well, I mean we're not seeing any more questions. We should encourage I guess everyone to come to the next webinar, to get the more exciting session with you and Chris.

36:24

Amy: Yeah, so we'll be covering in the next webinar, actually, the process of asking for money and how to go about That. I am just going to double check dates, so I can give you that now. Yeah next week, next Wednesday 17th at 2p.m. So, please do click on the website and you'll be able to register for that one.

Like I say we've recorded this and then we're online in a couple of days, but if any of you think of any questions that, you know, come up and as you kind of mull over what we've talked about, our email addresses are on there or you can contact us through the website. You know, happy to have an informal chat about where you're at and any advice you need.

Well yeah, thank you everyone for joining us. Hopefully it's been helpful and hopefully we'll see a lot of you next week to finish the process of gifted asking.

Andrew: Fabulous to see you all thanks for coming along

Amy: Brilliant, take care everyone