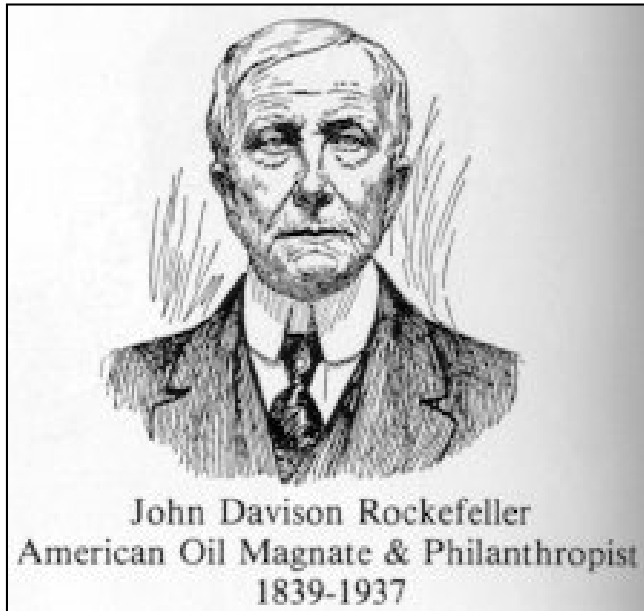




Asking for a Major Gift

- Potential donors want to hear from the leaders of the organization or their peers (not the paid fundraiser).
- The potential donor should monopolize the conversation (at least 66% of it). Your job as a solicitor is to ask leading questions and listen. Only interject to move the conversation along or to learn more about a topic.
- This is a “business” meeting. Exchanging pleasantries is nice, but get to the point quickly. You have plenty of other opportunities to tell old war stories.
- You should only ask for money if you have already made your own generous pledge to Chi Phi.
- Ask in person. If a face-to-face meeting is not possible, ask over the phone. Never ask through a letter or email.
- Tell a story about the impact the person's gift will have on students and the organization. Stress ideas and opportunities – not facts and figures (but be prepared to provide facts and figures should the prospect ask about them.)
- Ask someone to give the way you personally like others to ask you.
- Always ask for a specific amount.

Rockefeller's Technique of Solicitation



"Another suggestion I like to have made to me by a solicitor is how much I will give. Of course, such a suggestion can be made in a way that might be most annoying. I do not like to have anyone tell me what it is my duty to give. There is just one man who is going to decide that question – who has the responsibility of deciding it, and that is myself.

"But I do like a man to say to me, 'We are trying to raise \$2 million and are hoping you be desirous of giving () dollars. If you see your way clear to do so, it will be an enormous help and encouragement. You may have it in mind to give more; if so, we shall be glad. On the other hand, you may feel you cannot give as much in view of other responsibilities. If that is the case, we shall understand. Whatever you give after thinking the matter over carefully in the light of the need, your other obligations and your desire to do your full share as a citizen will be gratefully received and deeply appreciated.'

"When you talk to a man, do so in such a manner that he is glad to meet you again and will not take the other elevator when he sees you in the corridor, because you backed him up to the wall and forced him to give."

— John D. Rockefeller, Jr.

Asking for a Major Gift

	Conversation Elements	Suggested Language
STEP 1 <i>(5 minutes)</i> Begin the Conversation	Be friendly, but remember that the purpose of the visit is not social but business. Exchange amenities quickly. Thank the prospect for his interest and willingness to meet with you to discuss such important fraternity business.	
STEP 2 <i>(5 minutes)</i> Talk about Opportunities & Success	Let the prospect know why the campaign is so important. Use the fundraising materials to showcase the funding priorities and chart of gifts. Talk from the heart about why you chose to make a major gift. Tell him the amount you are contributing.	<p><i>We just concluded the Changing Lives campaign which has helped position us for long-term success. But we aren't finished. You saw the news over the past year. We need to make sure we are offering the right leadership training and support for our Brothers. Your support will help by...</i></p> <p><i>We need Brothers to provide leadership to continue the positive momentum we gained from the Campaign. All Brothers will eventually be asked to give. However, we start "from the top down" so that later brothers see a pattern and standard of high-level giving. Large gifts motivate others to give. Major gifts at the outset generate momentum that can continue our success. On this chart of gifts, you can see the number and types of gifts we need to reach our goal.</i></p> <p><i>I feel so strongly in this effort that I decided to contribute \$_____.</i></p>
STEP 3 <i>(15 – 30 minutes)</i> Ask for Feedback	Begin asking open-ended questions and let the prospect talk. It's ok to make notes while he is talking.	<p><i>What do you think about this new effort? Are we headed down the right path? Is our fraternity worth continuing? Should we ask Alumni to continue supporting our young Brothers? What kind of reaction might we receive? What do you think are the most important funding priorities?</i></p>
STEP 4 <i>(5 - 10 minutes)</i> Respond to Questions	Do your best to answer any questions raised by the prospect. Be truthful. Don't get defensive. You will hear some news or information that makes you feel uncomfortable. It's ok not to know every answer. You're a volunteer. Promise to get the answer after the meeting.	

<p>STEP 5 <i>(2 minutes)</i></p> <p>Ask him for the gift, and ask for a specific amount</p>	<p>You will never get a better opportunity to ask for the gift. The prospect expects you to ask. You must ask for a specific amount. This is critical. You never offend anyone by asking him to give too much. Be prepared to describe for the prospect what others are pledging to help set his sights at the right level. Remind the Brother that each person is being asked to do the best he personally can, and don't let him settle for just an average gift until you have tried as hard as you can to obtain the maximum pledge the prospect can give.</p>	<p><i>I realize that you are just learning about this effort. It's a lot to take in. But, based on everything we've discussed today, would you consider making a lead gift to this effort of \$_____?</i></p> <p><i>Knowing your interest and involvement over the years, we're looking for early supporters to make leadership gifts to it. Would you be open to entertaining a written proposal from us for a lead gift of \$_____ to create an endowed fund that will _____?</i></p> <p><i>I've made a gift of \$_____. Would you match what I'm doing?</i></p>
<p>STEP 6 <i>(5 minutes)</i></p> <p>Be Quiet</p>	<p>After you ask the Brother to pledge a particular amount, <u>wait for his response</u>. Keep quiet. Give him an opportunity to consider your request. It may feel like an eternity, but stay quiet until he reacts. If the Brother faints, keels over laughing, or absolutely refuses to pledge the requested amount, you've at least established a beginning point. From here, the rest of the conversation is a "negotiation" with only the amount to be decided.</p>	<p><i>Ok, if \$_____ is more than you are ready to commit to today, what amount are you comfortable contributing?</i></p> <p><i>While a gift of \$_____ is certainly important, it can't have the impact a gift of \$_____ would have. Is there any way you would consider contributing \$_____ if it were payable over five years?</i></p>
<p>STEP 7 <i>(5 minutes)</i></p> <p>The Final Answer - YES</p>	<p>Once the Brother agrees to make a pledge (or accept a written proposal), discuss the terms (pledge over five years, planned gift, gift of stock, etc.) of his gift and areas he may want to support (scholarships, leadership programs, his chapter, etc.). This is often the place where the OmegaFi professional should get more involved with the conversation. Once the subject of his gift is finished, ask him if he would be willing to serve as a volunteer by identifying prospective donors and/or assisting with solicitation calls like the one he just experienced.</p>	<p><i>Thanks so much for your gift of \$_____. Do you want to pay that over five years? How would you like to be reminded – on an annual, semi-annual, quarterly or monthly basis? When would you like to send your first payment?</i></p> <p><i>By making such an important gift to this effort, I know you care. Would you be willing to introduce us or ask others to participate at the same level as you are doing?</i></p>

<p>STEP 7 <i>(5 minutes)</i></p> <p>The Final Answer – MAYBE</p>	<p>Often, the prospect wants time to consider your request. He may want to talk with his spouse, lawyer or financial advisor. This is understandable. Ask him if he would like us to put together a written proposal about this subject. Offer to make yourself available to talk with the spouse, lawyer or financial advisor, if he would like. It is very important that you establish a time to follow-up. Explain any time sensitivity that may exist.</p>	<p><i>I understand you want to think about it. It's an important decision that will make a big difference in our organization. Would you like us to put together a written proposal? We'd be happy to talk with your wife / lawyer / financial advisor, if you think it would help.</i></p> <p><i>Since we're trying to close out this major gifts effort by _____, it would really help if you could give us an answer by _____. Can I call you in two weeks to talk more about this?</i></p>
<p>STEP 7 <i>(5 minutes)</i></p> <p>The Final Answer - NO</p>	<p>If the Brother refuses to make a pledge of any amount at this time, thank him for his time. If he has not already indicated, it is ok to ask why he is not interested in supporting the effort.</p>	<p><i>I understand you are not ready to support the effort right now. Are there conditions that might change in the future that might change your mind?</i></p>
<p>STEP 8 <i>(5 minutes)</i></p> <p>Thanks & End</p>	<p>No matter what answer the Brother gives, thank him for his time.</p>	<p><i>Thanks so much for meeting with us today. We'll keep you updated on the progress of this effort, and we'll be in touch next week with answers to the questions you raised.</i></p>