

*The Major Gift **ASK**: Fearless  
Leadership©*

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# *The Major Gift **ASK**: Fearless Leadership*

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- What we want to cover today:
    - Three parts:
      - “US” as fundraisers and leaders
      - The staff that we manage
      - The leadership that we manage, (CEO, President, Board Members) or “attempt” to manage
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# *The Major Gift **ASK**: Fearless Leadership*

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- What we want to cover today:
    - Understanding why people fear and hesitate to ask for money
    - What we can do to “overcome” these fears so that we “stop getting in our own way?”
    - How can we unleash the very best “major gift **ASK** skills” from ourselves, our staff, and our leadership to raise the most Money?
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# *The Major Gift **ASK**: Fearless Leadership*

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- At the end of this session you will:
    - Feel better about what you do and have a few “new or refined special skills” that you can use *immediately*
    - Know that you are not alone in this lovely world we have embraced, fundraising and management
    - Not begin to look for a new job...at least until next week! (HUMOR is a MUST today!)
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# Overcoming Fear or Hesitation

## What does \$ mean:

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- Defines your quality of life
  - Determines your success
  - Determines if you get an education
  - Determines where and how you live
  - Determines when and if you can retire
  - Governs how much you can own and borrow
  - In short – it's every aspect of your life and those you love!
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# What “gets in the way” of the ASK

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- Not knowing YOUR views on money
  - Not knowing The Person Being Asked views on money
  - Pressure to ask to make goals – personal or professional
  - Blatant fear they will not like you
  - Lack of confidence that you/cause are deserving of other people’s money
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# What “gets in the way” of the **ASK**

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- Afraid to ask the people you know
  - What if you ask for too much or too little?
  - Shouldn't someone with more authority/expertise do this?
  - I'll lose the person's yearly gift if I ask for a larger gift
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# Three Ways to Eliminate the Fear or Hesitation

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- The “soft approach”
  - The “direct approach”
  - The “share yourself approach”
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# How can we Better Manage our Staff to Raise Major Gifts?

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- Time Management
  - Clear and measurable goals and expectations
  - Be cross-functional
  - Risk Management
  - Communicate and demonstrate their value and contribution to the organization
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# How can we Better Manage our Staff to Raise Major Gifts?

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## □ Time Management:

- How many meetings do you have?
  - How many meetings do you require your staff to attend?
  - Multi-tasking does not save time and often leads to more work, for instance, the case of the missing report/e-mail!
  - What boundaries do you have to protect your time, good administrative assistant?
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# How can we Better Manage our Staff to Raise Major Gifts?

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## □ Time Management:

- Make sure you are giving your staff on a monthly basis enough time to make calls and visit prospects
  - Make sure your organization does not have too many *special events* that cannot “net” as much as if the time were spent on raising major gifts!
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# How can we Better Manage our Staff to Raise Major Gifts?

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## □ Exercise Time:

- What do you do with a development officer who has constant questions and e-mails for you and distracts your other staff?
  - What do you do with a major gift officer who always has some reason why she/he is not seeing prospects?
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# How can we Better Manage our Staff to Raise Major Gifts?

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- Clear and measurable goals and expectations:
    - Should have routine and uniform reviews every six months
    - Need to have *established number of visits a month* and what counts as “a visit” – chart is shared by everyone
    - Besides “raising money” what are the other articulated expectations, attend events and meetings, record contacts
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# How can we Better Manage our Staff to Raise Major Gifts?

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- Be cross-functional:
    - People actually to like learning new skills
    - Keeps them energized and engaged
    - Makes your office, a TEAM
    - Save you when someone is out on extended leave, maternity leave, or leaves for another job
    - Remember – this person now has two or three more skills which enriches their fundraising experience with you
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# How can we Better Manage our Staff to Raise Major Gifts?

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## Risk Management:

- What would prevent you/your team from having a successful year?
    - Data base goes down; building next door catches fire preventing you from entering your building; change in leadership; economy; changing tax laws (estate tax, form 990, IRA rollover)
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## Risk Management:

- How can you prepare for the risks that may occur?
    - Example – 3 people leave at the same time
    - Example – A bank that has significantly funded your group for years merges
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## □ Risk Management:

- Need an internal audit plan
  - Set objectives, identify and manage risks
  - Everyone must “buy in” to the importance of Risk Management
  - Make it part of your yearly goal setting with each person or division as well as a *plan of action* for each risk
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# Exercise Time

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- What two things do you know now that you didn't know before?
  
  - What one thing can you go back to your office and implement immediately?
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# How can we Better Manage our Staff to Raise Major Gifts?

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- Communicate and demonstrate their value and contribution to the organization:
    - “First Break All the Rules” – Gallup Organization interviews of over 400 companies – 2 key questions “Do I know what is expected of me?” “Do my opinions matter to the organization?”
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# How can we Better Manage our Staff to Raise Major Gifts?

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- Communicate and demonstrate their value and contribution to the organization:
    - Easiest and most cost-effective way to retain good workers and managers
    - What ways do you motivate/celebrate your employees?
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# How Can We Lead Our Leadership to Raise Major Gifts?

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- Start out on the *Sympathetic Side*:
    - Fundraising is hard work
    - Not a lot of people want to devote this much time in fundraising when administration and leadership are far more “savvy” than raising money
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# How Can We Lead Our Leadership to Raise Major Gifts?

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- Many feel their “time” is their “contribution”
  - When they hear the words “capital campaign” suddenly their board tenure is over!
  - Their fiduciary and fiscal duties can be overwhelming
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# How Can We Lead Our Leadership to Raise Major Gifts?

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- They have 1.4 million charities to choose from to share their time and talents
  - Board meetings, committee meetings, special events, board retreats – this is a lot of time!
  - Their expertise is invaluable, but sometimes they are reluctant to bridge the “two worlds” of their business/technical knowledge and their non-profit work
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# How Can We Lead Our Leadership to Raise Major Gifts?

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## □ Some Suggestions:

- It is our job to train them or refine their skills
  - Each leadership person must be treated separately and individually, just like our donors
  - We have to make it as simple and organized as possible – My example
  - Quick, small successes go a long way
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# How Can We Lead Our Leadership to Raise Major Gifts?

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- Some Suggestions:
    - According to the *Advisory Board Company, more Top Donors were identified by Board Members, volunteers and other donors*
    - *Leading Up* – it is our jobs to help train them on all the nuances of fundraising
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# How Can We Lead Our Leadership to Raise Major Gifts?

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- We forget – **WE ARE the EXPERTS in this field**
  - Some embrace it, others ignore us
  - Best we can do is work *with* them or *around* them
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# Suggested Readings

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- ❑ **You're in Charge, Now What?** by Thomas J. Neff and James M. Citrin (Three Rivers Press)
  - ❑ **Getting Things Done** by David Allen (Penquin)
  - ❑ **Now Discover Your Strengths** by Marcus Buckingham and Donald O. Clifton (Free Press)
  - ❑ **Good to Great** by Jim Collins (Harper Business)
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# Suggested Readings

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- ❑ **Leading Up, How to Lead Your Boss so you Both Win** by Michael Useem
  - ❑ **First, Break all the Rules** by Marcus Buckingham and Curt Coffman
  - ❑ **Gain the Edge: Negotiating to Get What you Want** by Martin Latz (St. Martin's Press)
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