



# Adapting your Case for Support & Major Gift Visits

**Presenters Nat Wyeth & Kristin Priest**

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# Today's Presenters.



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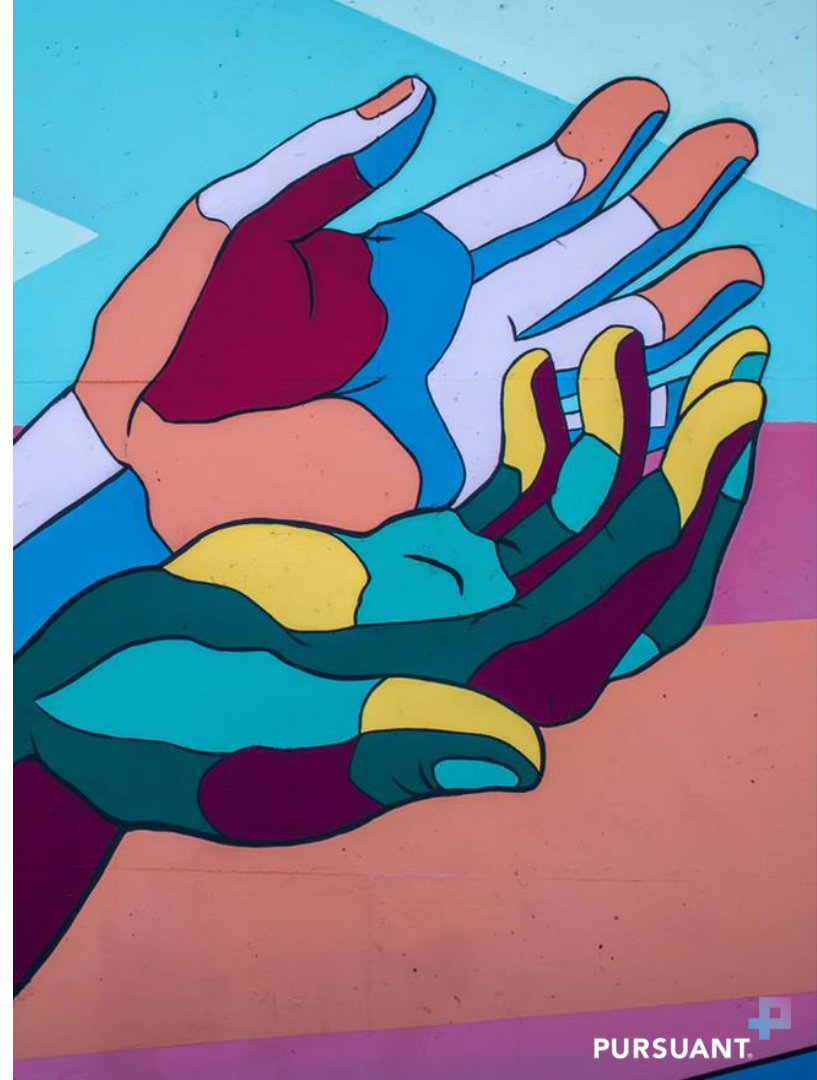
Pursuant

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**THE** Case for  
support

vs.

**THEIR** Case for  
Support







# 2020 - 2021 Case(s) for Support

*In light of 2020 -2021 events, why are we and our mission more relevant than ever?*

National Virtual Congregation



Covid-19 Memorials



Relevant Programming



*What new funding and donor opportunities exist as a result of 2020?*





# The Art.

# Powerful Questions Through the Donor Journey.

- Relationship Building
- Organization Discovery
- Cause & Values Identification
- Vision Casting
- Ask Building
- Making the Ask







# Relationship Building

- One of the most under-utilized portions of the donor visit.
- In the age of COVID and the virtual visit, getting this right has become increasingly important.



# Relationship Building Questions.

What made you decide to pursue a career in \_\_\_\_\_?

How has \_\_\_\_ impacted your work/business

How has it impacted your family?

How are you and your family doing right now?



## Cause & Values

- Who are your major donors as 'self actualized' philanthropists?
- Move past their connect to you to identify their greatest passion.

# Causes & Values Questions

What role does \_\_\_\_\_ play in your life?

What about this situation/cause do you care so much about?

What in your view is the greatest impact we can have in the country, world or community?

What do you think prevents \_\_\_\_\_ from being done?





# Ask Building Questions

- Transition from a discussion of the vision to a discussion of the gift.
- Creates space for donors to give permission to ask.

# Ask Building Questions.

What would you like to accomplish with your money that is meaningful to you?

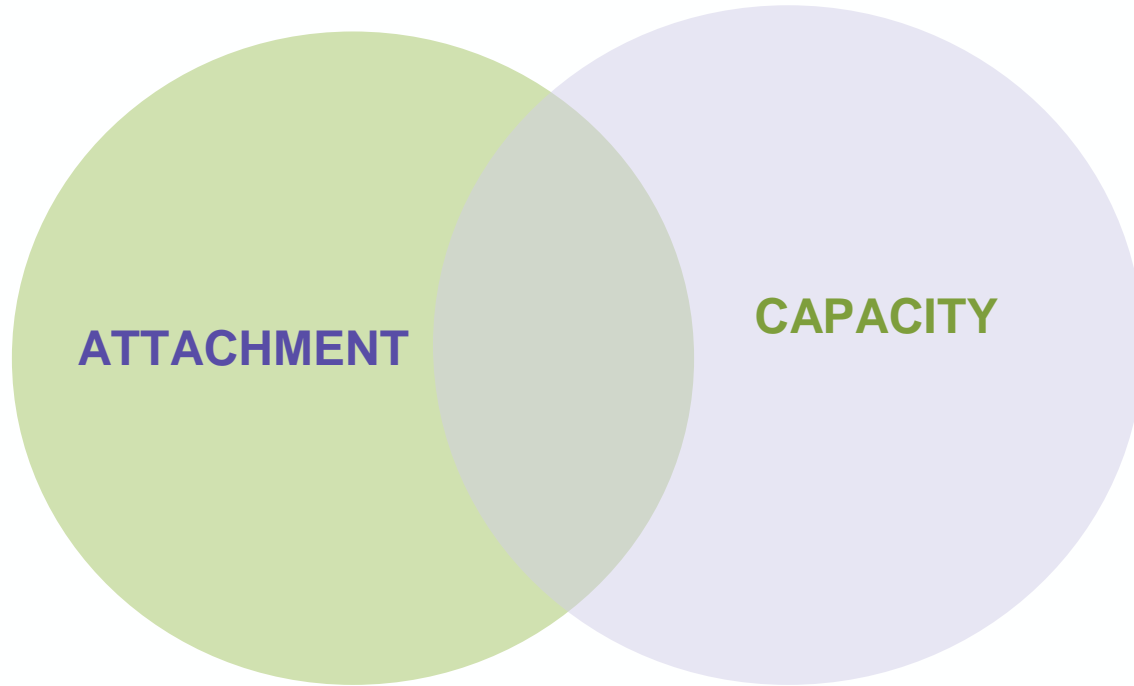
As you think about your philanthropic giving priorities for the year, where might \_\_\_\_\_ fit within that?

What needs to be true for you to consider a gift?

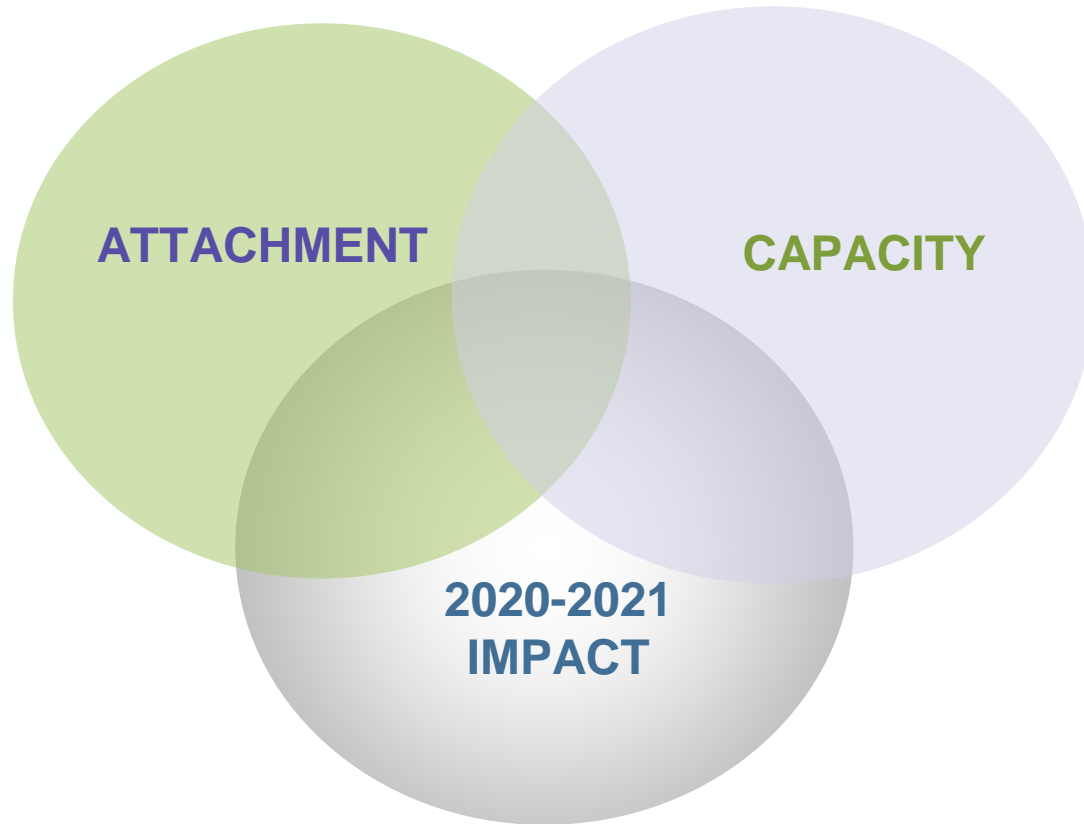
# The Science.



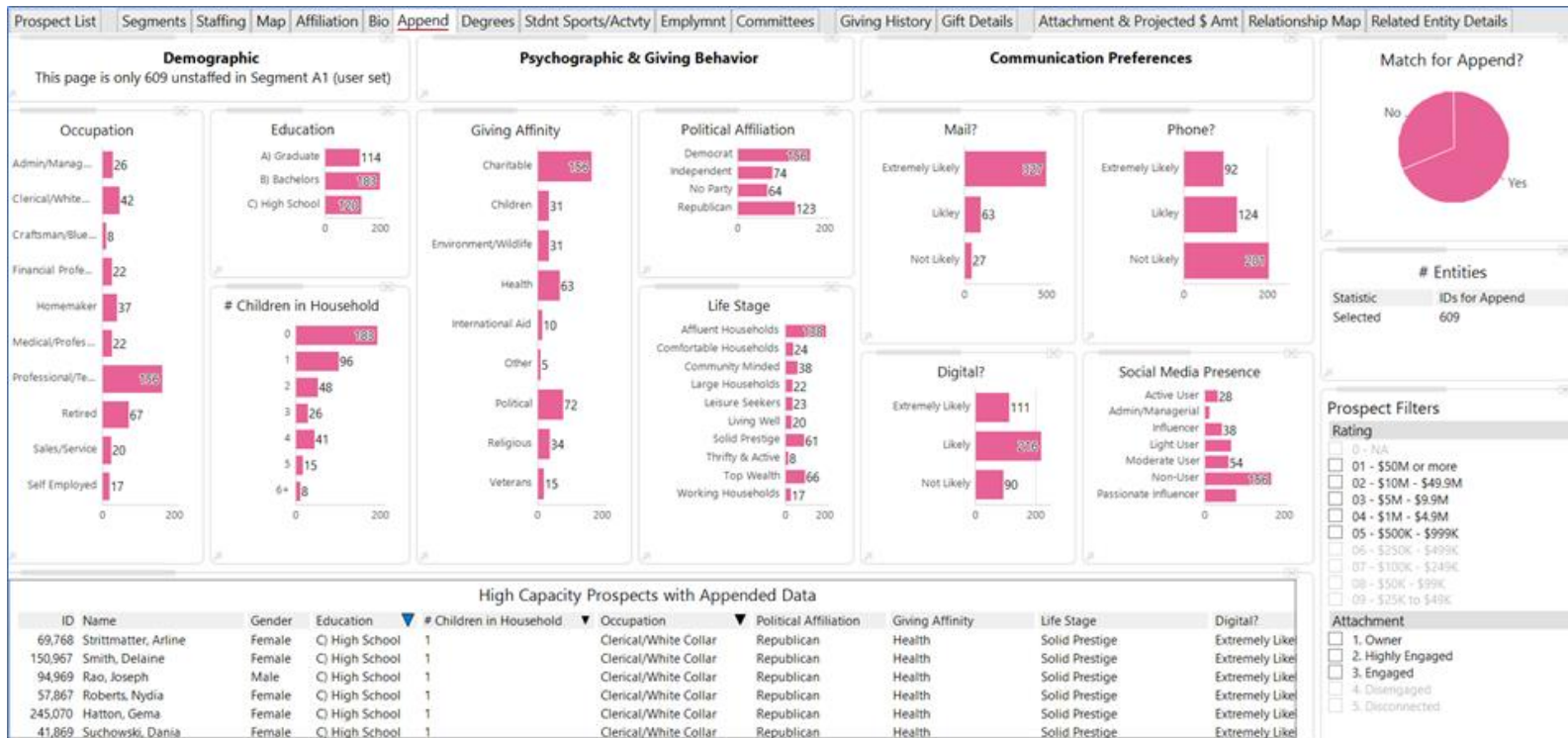
# Variables in Major Giving



# Variables in Major Giving *RIGHT NOW*



# External Data Appends.







# Leveraging data to identify relationships



- Discover “who knows whom”
- Internal data & social media

# Here's a scenario...

Joe



10 other people in your database



Mary



- BA class of '81
  - Engineering Major
  - Zeta Psi Fraternity
- Harvard MBA '86
- Now lives in Chicago
- Attended gala
- Attended '96, '01, and '16 Reunions
- Member of XYZ Country Club

- Board member
- Chair Engineering Campaign
- Connection with Joe:
  - Class '81
  - Engineering Major
  - Harvard MBA '86
  - Also lives in Chicago
  - Attended '16 Reunion



# The Science & Art of Virtual Visits.

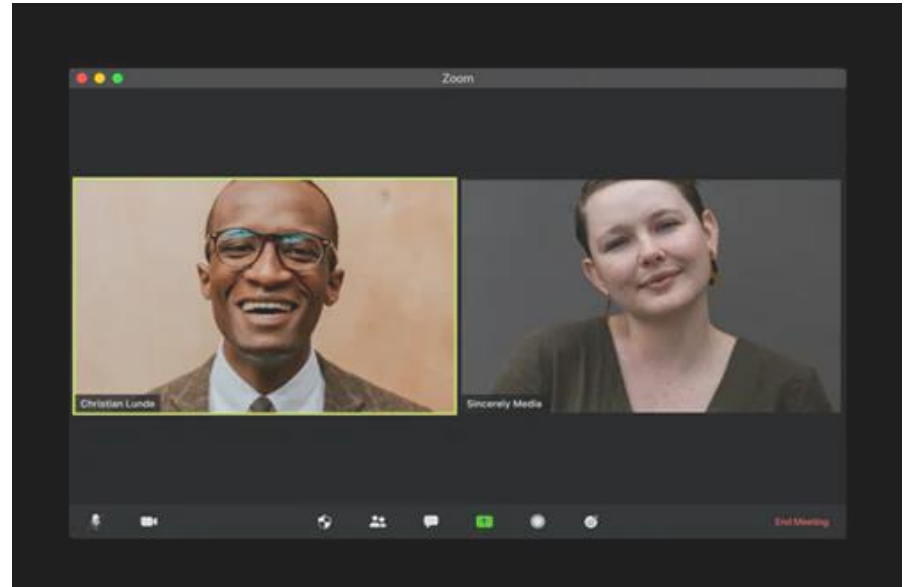
# Virtual vs. in-person visits

Qualification: **Phone, Email or Online**

Early Cultivation: **Visit most important**

Mature Cultivation: **Visit less important**

Solicitation & Close: **Visit may *hurt***





# Creating a Virtual Moment

Or, “How to avoid creating *another* Zoom meeting!”

1. Clarify the purpose of the meeting in advance
2. Use Doordash or similar for a virtual meal
3. Send ahead package/treats
4. Invite donors and/or internal experts
5. Leverage technology (mini concert or tour)



THANK  
YOU.

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