

What's the Best Way to Approach a Major-Gift Prospect?

What do you say to someone who's not a major donor but who could be one?



Q We have a donor who has the capacity to give much more than he's doing now. Do you have any tips for turning him into a major donor?

A Try to meet him at a social or civic event. Say, "There's something really interesting I want to talk to you about. Can I stop by your office sometime for a chat?" (If you can't find a way to run into him, you can call instead.)

At the meeting, ask for his advice. Say:

- Here's our project – what do you think of it?
- Here's our goal – what do you think?
- How can we raise the money?
- Who do you think would be interested?
- How can we best present our project to potential donors?

“Have him do most of the talking.”

Asking for his advice will engage him. Have him do most of the talking. See where he stands, and find out his hot buttons. Don't ask for a gift just yet. Come up with a way to meet him again, perhaps by inviting him to visit you at your facility. The more times you're with a prospect before you ask, the bigger the ultimate gift will be.

– Gail Perry, MBA, CFRE, Gail Perry Group, gailperrygroup.com

Does a Grant Writer Need to Register?

Does the law require registration for grant writers?

Q Must a grant writer register to solicit funds in the state where the charity is soliciting?

A A consultant grant writer never has to “register to solicit” charitable contributions because the grant writer isn't soliciting funds. “Registration to solicit” is required by charities that directly or indirectly solicit for their own benefit in the 39 states and the District of Columbia that have charitable solicitation registration statutes, unless they're exempted from the statute of the state in which the solicitation is being made. A grant writer, if being paid for the work, will probably be required to file a different registration, as a fundraising counsel, because the grant writer is advising the charity or providing written materials for the solicitation. The writer will probably have to register at least in the state in which the charity is located if the state has a solicitation registration statute.

Some states take the position that the grant writer also has to register in their state because the charity uses the fundraising counsel's work for soliciting in their state. The argument has more validity if the counsel helps make a state-specific request, but some states say that registration is required whether or not the grant writer has any other contact with the state and simply makes general recommendations for the charity to use anywhere.

There are constitutional questions about whether a state has jurisdiction over a writer who works only in another state and provides only material unrelated to the state claiming the requirement to register. I don't consider the question finally settled, and the grant writer should obtain knowledgeable counsel to advise on the specifics of the situation.

– Don Kramer, *Nonprofit Issues*, nonprofitissues.com

