



How to Get Your Donor to Say "Yes!"



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Time: 1:00 – 2:30 Eastern Time

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Four Noble Truths

- Life means suffering.
- The origin of suffering is attachment
- Cessation of suffering is possible.
- Following the eight-fold path leads to the cessation of suffering.



The Eight-Fold Path of Buddhism

- Right view
- Right intention
- Right speech
- Right action
- Right livelihood
- Right effort
- Right mindfulness
- Right concentration





Four Noble Truths for Fundraisers

- Fundraising entails suffering.
- The reason for this suffering is the wrong approach.
- Fundraising can be fun when donors say “yes.”
- You will get to a “yes” more often if you follow the eightfold path.



Eightfold Path of Successful Fundraising

- Right prospect
- Right cultivation
- Right project
- Right solicitor(s)
- Right timing
- Right “ask”
- Right giving method
- Right follow-up



1. Right Prospect



Linkage



Ability



Interest



Ideal Prospect: Linkage, Interest, and Ability





2. Right Cultivation

- Should both major and planned gifts prospects be included in a “moves management” system?
- Should both be subject to a prospect clearance protocol?
- Are both motivated by the same factors?



Motivations for Giving

- *Noblesse Oblige*
- Payback
- Empathy
- Religion
- Recognition
- Tax Savings



Noblesse Oblige





Payback



Magic Johnson



Magic Johnson Fdn Scholarships



Empathy





Religion



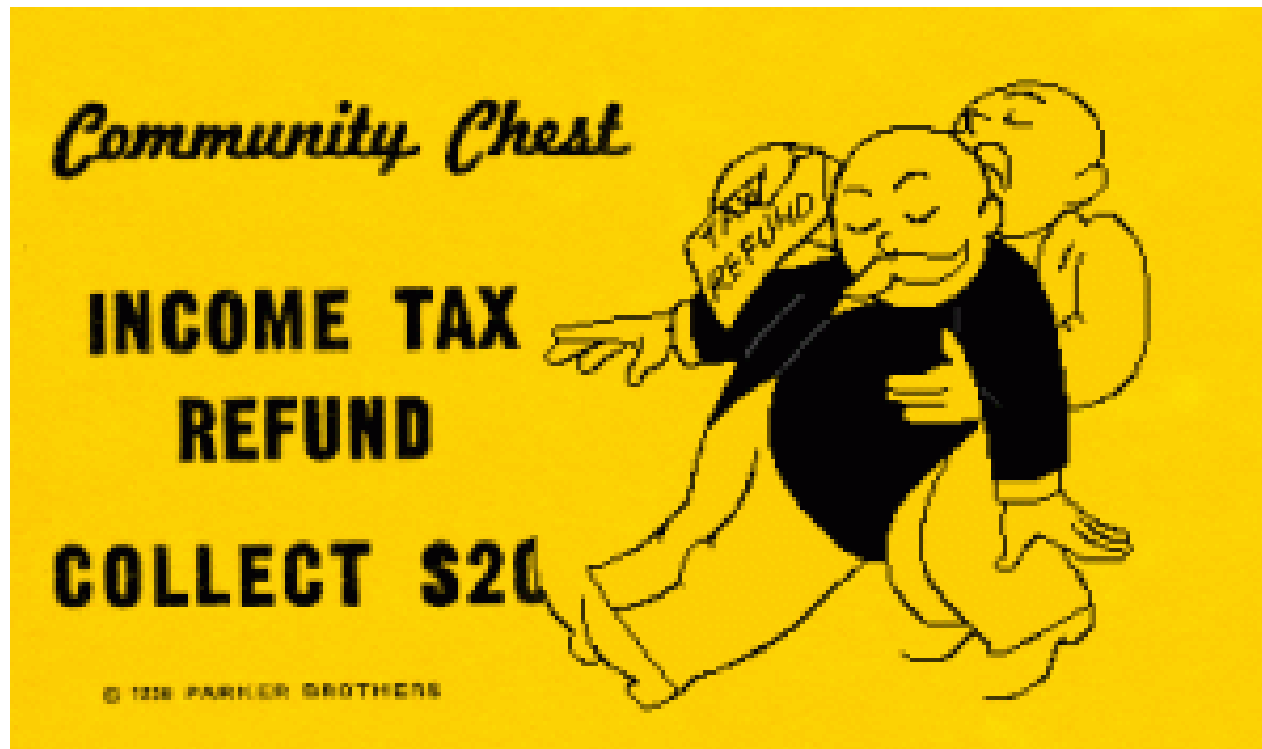


Recognition



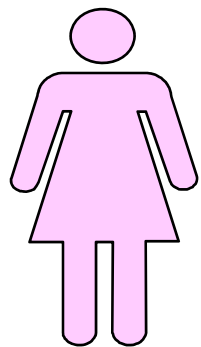


Tax Savings





3. Right Project

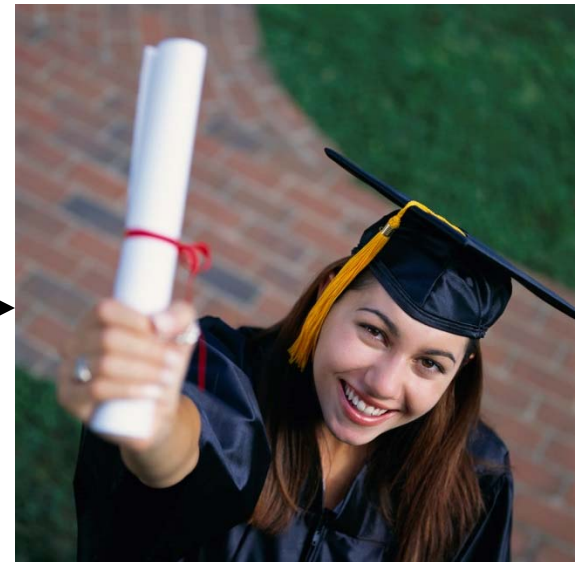


Donor

Gift

Endowed
Scholarship

Award





Accommodating Donor Interest





4. Right Solicitor(s)

Major Gift



Volunteer or Charity leader
with development officer

Planned Gift



Gift Planning Officer



Why Planned Gifts are Staff Driven

- Easier to get access to retired person
- Technical knowledge required
- Donors reluctant to reveal personal information to a volunteer
- Time-consuming process



5. Right Timing



“Scheduled Time”



“Right Timing”

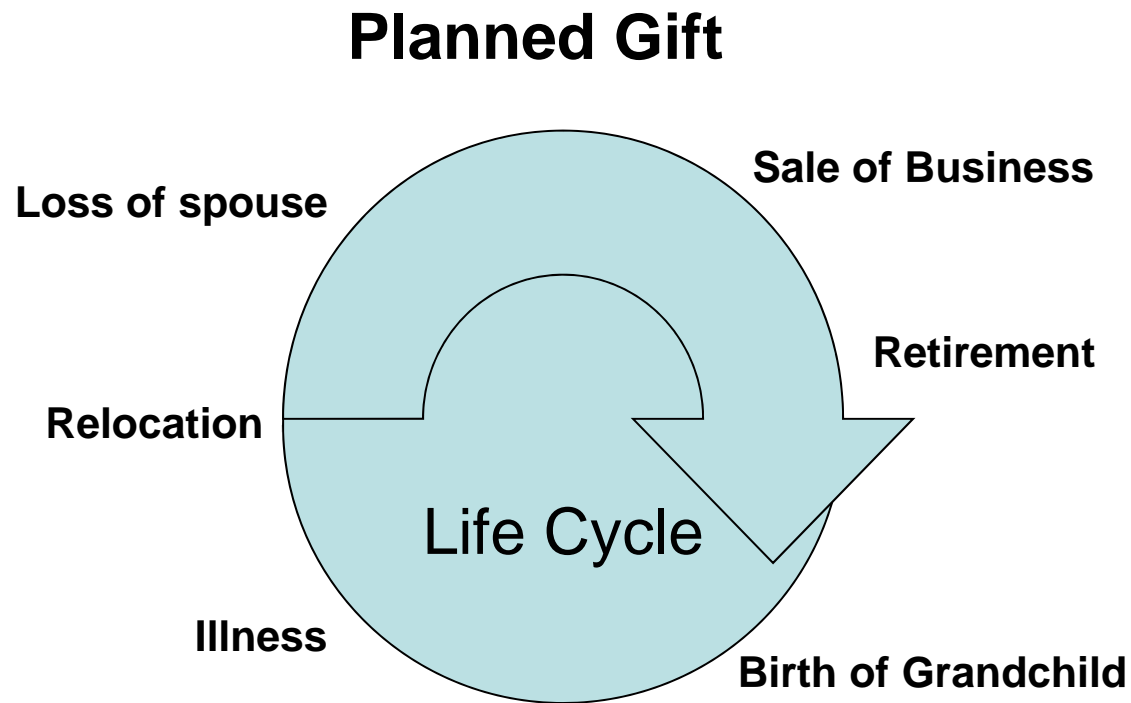


Timetable for Campaign Solicitations

2015	Leadership gifts
2016	Principal gifts
2017	Major gifts
2018	Regional gifts
2019	Small gifts



Planned Gifts Affected by Life Cycle





How Planned and Major Gifts Differ

Major Gift	Planned Gift
Discreet ask for a specific amount	Often no discreet ask
Discussion of period payment	Final step of a natural progression
Often little discussion of tax implications	Extensive discussion of tax aspects and gift design

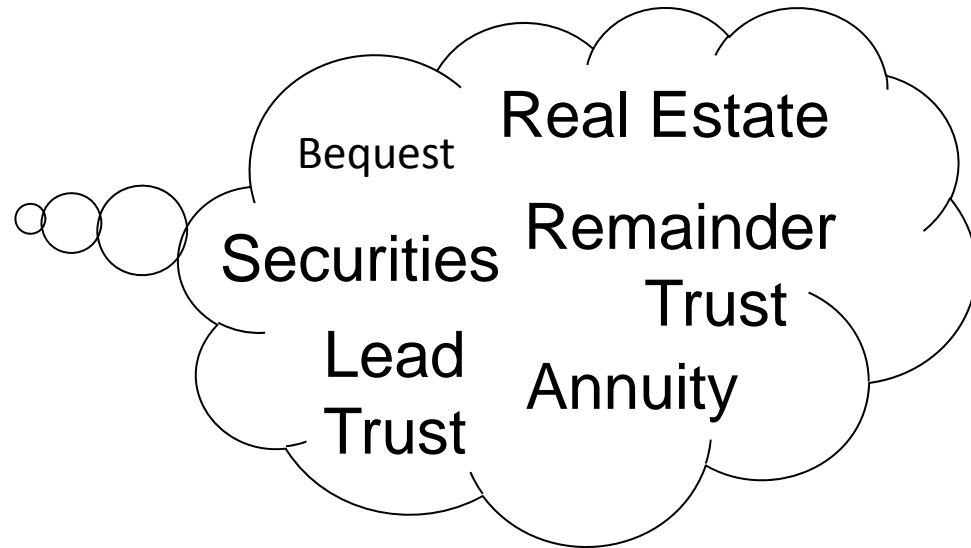
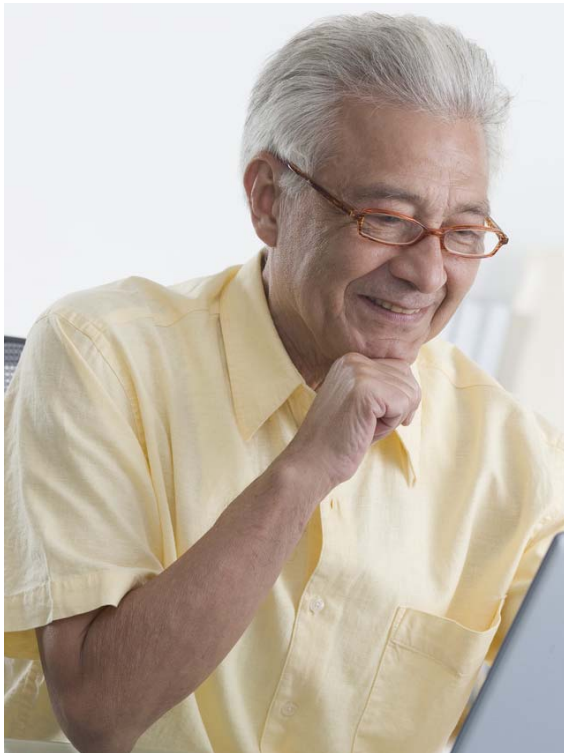


Expect the Unexpected





7. Right Giving Method



Essential Part of Planned Giving



Discussion of Giving Method May Not Be a Part of Major Gift Solicitations

- Donor may be sophisticated about charitable giving
- And, have expert profound advice, but
- But in some cases proposing a feasible giving method is critical



Right Follow Up

- ☞ Gift agreement
- ☞ Pledge agreement
- ☞ Endowment agreement
- ☞ Trust agreement
- ☞ Gift annuity agreement
- ☞ Deed
- ☞ Beneficiary form





Buyers Remorse





Renegotiating the Gift





Instructions to Campaign Volunteers by Frederick Gates in 1890





Questions and Answers





Still Have a Question?

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