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How to Get Your Donor to Say "Yes!"

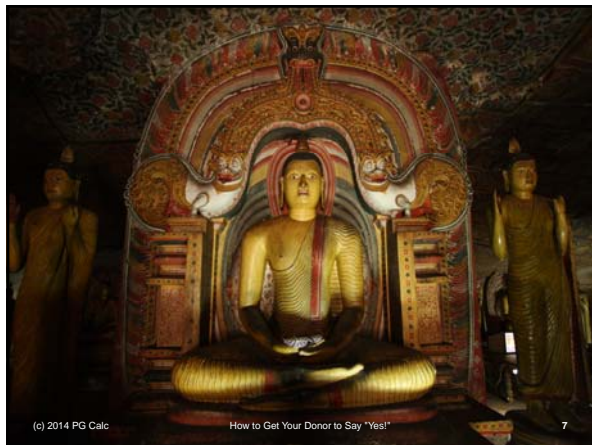


Date: November 20, 2014
Time: 1:00 – 2:30 Eastern Time

Presenter: Frank Minton
Principal
Frank Minton Consulting, LLC



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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.

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The Eight-Fold Path of Buddhism

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




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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.

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Eightfold Path of Successful Fundraising

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

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1. Right Prospect



Linkage

Ability

Interest

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Ideal Prospect: Linkage, Interest, and Ability



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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?

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Motivations for Giving

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

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Noblesse Oblige



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Payback




Magic Johnson Magic Johnson Fdn Scholarships

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Empathy



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Religion



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Recognition



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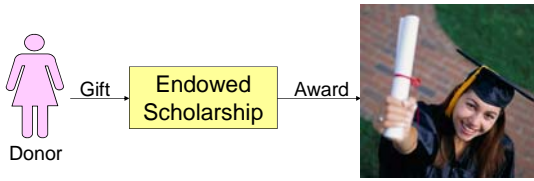
Tax Savings



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3. Right Project



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Accommodating Donor Interest



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4. Right Solicitor(s)

Major Gift



Volunteer or Charity leader with development officer

Planned Gift



Gift Planning Officer

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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

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5. Right Timing

"Scheduled Time"



"Right Timing"



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Timetable for Campaign Solicitations

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

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Planned Gifts Affected by Life Cycle

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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

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Expect the Unexpected



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7. Right Giving Method



Bequest Real Estate
Securities Remainder
 Trust
Lead Annuity
Trust

Essential Part of Planned Giving

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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

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Right Follow Up


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



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Buyers Remorse



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Renegotiating the Gift



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THE UNIVERSITY OF CHICAGO

Instructions to Campaign Volunteers by Frederick Gates in 1890

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Yes, yes, yes!!

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Questions and Answers



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Still Have a Question?

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