


Qualification

Goal
To verify the candidate is a potential major donor

Steps

- Begin to gather information that confirms existing internal data and builds their prospect status profile
- Done through a visit or phone call
- Make it a thank-you call: their recent gift, their loyalty ...



Qualification

Steps

Have an easy, natural conversation with them to discover:

- Inclination
- Where your organization is positioned in their giving
- Knowledge of your organization
- Charitable commitments
- Capacity
- Family history
- Family commitments
- Real estate owned
- Travel



Qualification

Outcome

The donor is a candidate for a major gift(s) and is moved into cultivation.

or

The donor is not a candidate for a major gift(s) and is removed from the prospect list.




Cultivation

Goal

Matchmaking

Match the potential giving level and interest with the identified and approved giving opportunities of the organization.


Can be capital or project-based, including operations.



Cultivation

Qualities

- Listen, listen, listen
- Engage, engage, engage
- This is an art and a science
- A touch for “knowing”
- Building trust



Cultivation

Steps

- Meet them in their world
 - Place, dress, communication style (for example)
 - Are they older
 - Soft-spoken
 - Enjoy humor
 - Businesslike
- Have a high level of interest in them
- Be conversational, ask thoughtful questions

• *ASKING STRATEGIC QUESTIONS® For Organizations,*
– *A Resource of The Osborne Group, Inc.*



Cultivation

Steps

- Discover their area of passion in the work of the organization
- Learn more about them to help inform you of their approach to, knowledge and practice of philanthropy
- Are they potential planned giving candidates
- Discover their societal connections, people that may be involved in the organization who can influence this relationship or whom they can introduce you to
- Learn as much as you can about their personal life journey



What tickles their fancy?





Cultivation

Steps

- Share work, outcome and vision of the organization, especially in the areas of the donor's greatest interest/passion
 - Moving stories with footage, photos
 - Metrics: goals and current outcomes
 - Make monthly touches
- As the relationship develops, request additional information from research staff as needed



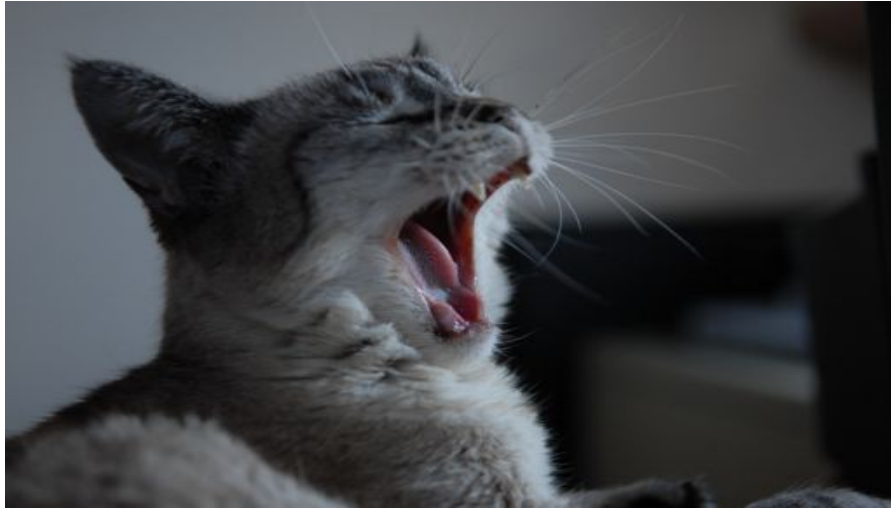
Cultivation

Steps

- Get the donor involved and deeply engaged
 - Tour the location
 - Attend events: adoptions, presentations, workshops
 - Meet staff working in the area they are interested in
 - Meet special-needs animals
 - Volunteering




Keep it exciting and engaging with new information and meaningful experiences.



Cultivation


Steps

- Determine the direction to take the donor toward a gift based on potential giving level and area of interest
 - Continue to provide stories and information in that specific area to engage further
- Create both long-term and immediate strategy to move the relationship along
 - Plan significant touches strategically in advance
 - Is this gift a step toward another larger gift or is it their significant lifetime gift



Solicitation


Making the “Ask”



Solicitation

Make It “Right”


The right person(s) asks the right prospect for the right amount of gift for the right cause at the right time in the right place, with the right team and the right materials.



Solicitation

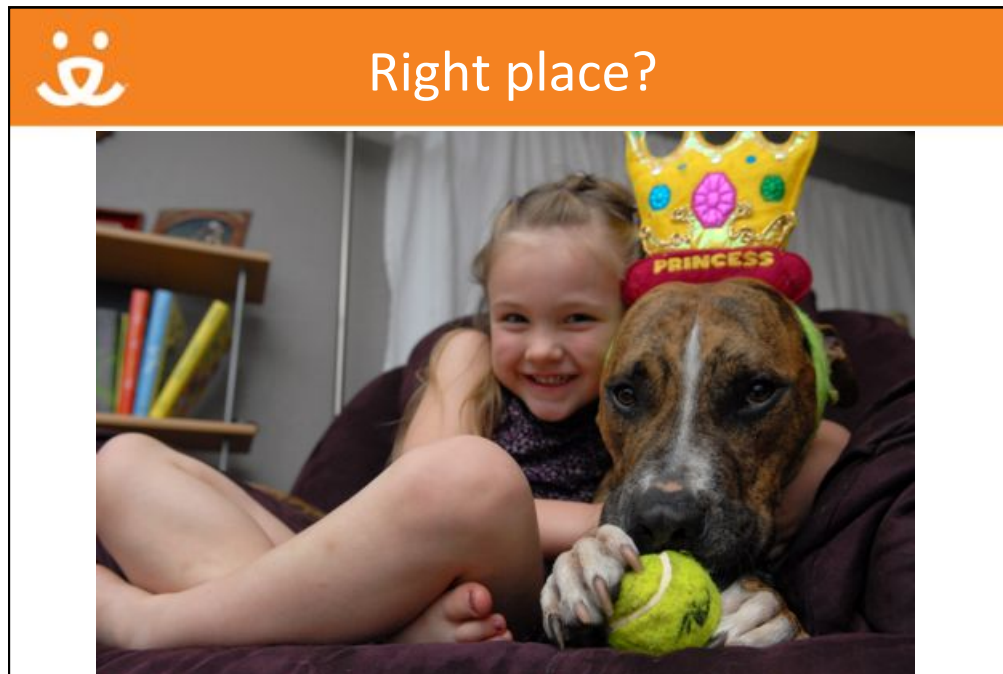
Steps

- Permission to ask
 - Prepare the donor for the “ask” by asking if you can present them with a proposal for a gift to support the area they are so passionate about
 - Include the donor’s spouse or partner if he/she is involved in the decision making




Solicitation

Right Place	Right Time
In a quiet place that is most comfortable for them.	At a time when they can relax and not be concerned about their next appointment.
Their office or home is best.	
No distractions.	




Solicitation	
Right Cause	Right Amount
Prepare proposal suited to donor's area of passion that is a fit for the organization as well.	If this is their ultimate lifetime gift, make the "ask" reaching to their highest capacity.
Make it personal to them.	If this "ask" is part of your strategy to eventually move them toward their ultimate lifetime gift, then make the amount significantly larger than their largest gift to date.
Include stories, impact and metrics that are related to the gift impact.	



Solicitation

<p>Motivation</p> <p>What motivates their giving? This is part of the “ask” when delivering. Can be addressed by the CEO or executive director.</p> <ul style="list-style-type: none">• Recognition• Making a difference in their area of passion• Whatever is most important to the organization• Match appeal• Lead gift	<p>Recognition</p> <p>Be prepared to honor them with a recognition that will be meaningful to them and that the organization is in agreement to provide.</p> <ul style="list-style-type: none">• Name on a building, on a wing, on a vehicle• Mention in newsletter, website, annual report, media
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Solicitation

Steps

- Preparation of the “ask” in consultation with supervisor, peers, CEO or executive director
- Choose the best team to do the “ask” with:
CEO or executive director, staff who donor knows and respects, natural partner
- Practice with the team, write out the “ask,” practice the “ask,” role play



Role play



Solicitation

Steps

Who makes the “ask”?

- The development staff usually speaks the “ask”
- If another person (e.g., the CEO or executive director) is best suited, then that takes priority



Solicitation

Steps


The “ask”

- Bestow honor, praise and thanks for all they have done, their loyalty and their desire to make a significant difference to the organization’s mission to “_____”
- Share organizational excitement about the area they are interested in gifting
- Describe the transformational impact their gift will make: stories, metrics
- State specific amount of the “ask”
- Be quiet





Wait for their response.




 Wait!


And the answer is ...


 YES!!!



 Wait!

And the answer is ...

 Not what you expected





Solicitation

Response # 1

Yes! A joyful giver!

Steps

- Each team member thanks them in a very heartfelt way
- CEO or executive director offers to honor the gift with a specific recognition that is meaningful to them — details to be negotiated.
- Follow up with a signed gift agreement:
 - Amount and purpose of gift
 - Giving schedule: one check this year or next, three-year pledge ...
 - Recognition stated
- Begin stewarding and return to cultivation



Stewardship

Goal

- Follow up on gift to keep donor engaged

Steps

- First, thank you from relevant levels of the organization
 - CEO, executive director, project/program staff, staff they relate to
- A special thank-you gift
 - Signed photo, personalized book depicting the project
- Sharing impact of gift on regular basis
 - Stories? Metrics?
 - Have staff involved in update reports, calls, visits



Stewardship

Outcome

Donor is feeling overjoyed about the experience and is motivated to give another significant gift.

Cultivation begins while stewardship continues.



Solicitation

Response # 2

This gift is the donor's ultimate lifetime gift.
Stewardship continues through the relationship.
Begin cultivation for continued giving.



Solicitation

Response # 3

Donor has not responded as expected

- Wrong time?
- Wrong area of interest?
- Wrong amount?
- Not engaged enough?
- Not their top charity?
- Need to think about it



Cultivation

Steps

- Thank them for their support and loyalty
- Discuss next engagement step with them
- Ask them to give you advice to learn how to do this better next time
- Return to cultivation

“Fall seven times, stand eight.” – Japanese proverb



Joyful Giving

“We exist temporarily through
what we take,
but we live forever through
what we give.”

– Douglas M. Lawson



Thank you

Thank you for all that you are doing
and giving to save and enhance the
lives of animals.

May your work and lives be blessed
a hundred fold.

– Anne Mejia

