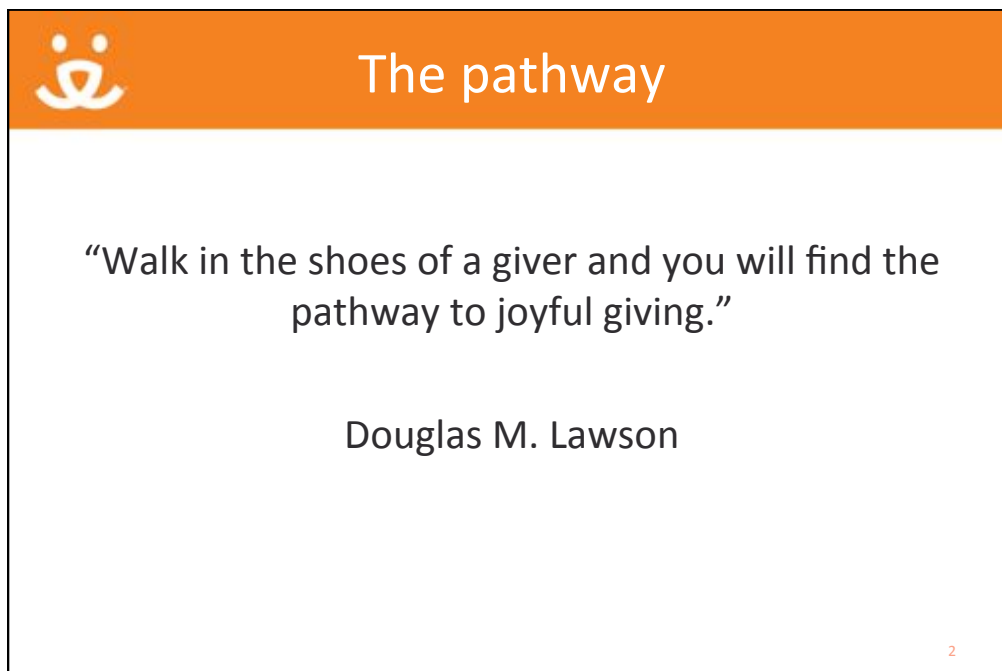




Gifts That Keep Giving: Cultivating Major and Planned Gifts (Anne Mejia)



 Matchmaking




3

 Moves management



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## Qualification

**Goal**


To confirm that the candidate is a potential major donor

- Inclination
- Affinity
- Capacity

**Inquiry**

- 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

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## Top wealth screening companies

- [DonorScape](#)
- [DonorSearch](#)
- [WealthEngine](#)
- [LexisNexis Development Professionals](#)
- [Blackbaud's Target Analytics](#)

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Typical information included in wealth screenings:

### Assets

Real estate  
Business  
Securities  
Income/compensation

### Wealth indicators

Biographical data  
Political donations  
Philanthropic gifts  
Nonprofit affiliations

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## Qualification

### Discovery

Have an easy, natural conversation with them to discover:

- Inclination:
  - Where your organization is positioned in their giving
  - What their other charitable commitments are
- Affinity:
  - How engaged are they?
  - How recent were their gifts and what was the size of the gifts?
  - Have they volunteered for your organization?
  - Do they read your website content or magazine?
  - What is their knowledge of your organization?

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## Capacity

- Family history (wealth inherited, business inherited)
- Travel
- Real estate (second, third or fourth homes; rentals, both commercial and residential)
- Business (own, founded, CEO, privately owned or public, just sold, about to sell)
- Gifts given elsewhere (amount, naming recognition, impact)

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## Typical information included in wealth screenings:

### Assets

- Real estate
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- Securities
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### Wealth indicators

- Biographical data
- Political donations
- Philanthropic gifts
- Nonprofit affiliations

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## Qualification

### **Outcome**

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

or

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

*They may, however, be a candidate for planned gifts and can be presented to the planned giving manager.*

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## Cultivation

**Goal:** inspirational matchmaking

Match the donor's potential giving level and interest with the identified and approved giving opportunities of the organization. Can be capital or program based, including operations.

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## Cultivation

**Qualities**

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

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## Cultivation

**First meeting**

- Meet them in their world
- Pay attention to place, dress, communication style  
(For example, are they older, soft-spoken, enjoy humor, business-like?)
- Have a high level of interest in them
- Be conversational: Ask thoughtful and intentional questions

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

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## Cultivation

### Getting to know them

- Discover their area of passion in the work of the organization
- Learn more about them to help inform you of their approach to and knowledge and practice of philanthropy
- Are they potential planned giving candidates?
- Discover their societal connections — people who 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

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### They are special

- Birthdays
- Anniversary
- Pets and their names
- Favorite staff member
- How they best like to hear from you (phone, email, text, etc.)
- What their fears are, what their dreams are

Giving to you brings them joy because you authentically care about them as people, not just as a source of money for your organization.

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## What tickles their fancy?



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## Cultivation

### Having impact and measuring interest

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

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## Cultivation

### Going deeper

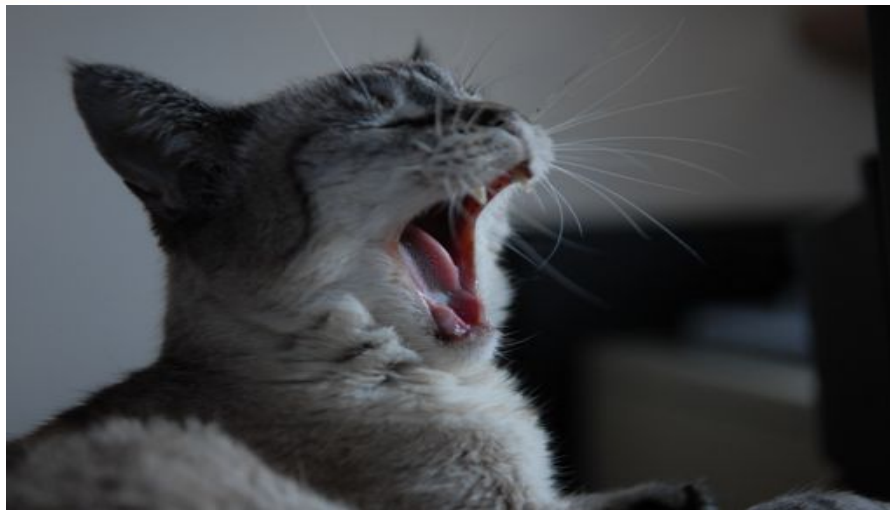
Get the donor involved and deeply engaged:

- Tour location
- Include staff and leadership
- Attend events: adoptions, presentations, workshops
- Meet staff working in the area the donor is interested in
- Meet special-needs animals
- Adopt
- Volunteer
- Seek their advice

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Keep it exciting and engaging with new information and meaningful experiences



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## Cultivation

### Intentional direction

- 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?


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### Pre-solicitation: permission to ask

- They have shown passion for an area of the organization's work in which there is a giving opportunity.
- Ask if this is an area to which they would like to make a significant impact by directing their next gift there specifically.
- If yes, offer to bring them a proposal to consider and set the next visit date.
- If no, ask more questions. Discover what they would like to do at this time. Maybe the area of interest or timing is not right.


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## Solicitation

# Making the “ask”

23




## Solicitation

**Make it “right” : the heavenly seven**


- right team
- right person
- right amount
- right purpose
- right time
- right place
- right materials


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 Solicitation


|   |  |
|---|--|
| <p><b>Right place</b></p> <p>In a quiet place that is most comfortable for them.</p> <p>Their office or home is best.</p> <p>No distractions.</p> | <p><b>Right time</b></p> <p>At a time when they can relax and not be concerned about their next appointment.</p> |
|---|--|

25

 Right place?




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## Solicitation

|   |  |
|---|--|
| <b>Right cause</b><br><br>Prepare a proposal suited to the donor's area of passion that is a fit for the organization as well.<br><br>Make it personal to them.<br><br>Include stories, impact and metrics that are related to the gift impact. | <b>Right amount</b><br><br>If this is their ultimate lifetime gift, make the ask reaching to their highest capacity.<br><br>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. |
|---|--|

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## Solicitation

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

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## Solicitation

### Team prep

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

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## Role play



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## Solicitation

### Who makes the ask?

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

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## Solicitation

### The ask

- Bestow honor, praise and thanks for all they have done, for 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


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 Wait for their response





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 Wait!


**And the answer is ...**

34

 YES!!!




35

 Wait!


**And the answer is ...**

36

 Not what you expected



37


 Solicitation

Yes! A joyful giver!

**What's next**

- Each team member thanks them in a very heartfelt way
- The 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 (e.g., one check this year or next, three-year pledge)
  - Recognition stated
- Begin stewarding and return to cultivation

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## Stewardship


**Goal**

Go the extra mile to excite them about the impact of their gift and deepen the donor's engagement

Make it personally meaningful:

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

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## Stewardship

**Outcome**

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

Cultivation begins while stewardship continues.

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## Solicitation

### **The answer is no**

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

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## Cultivation

### **What next?**

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

*Fall seven times, stand eight.* – Japanese proverb

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## Joyful giving

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

Douglas M. Lawson

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## 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

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 Namaste



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