Individual Giving: The Artful Ask!

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Special Guest: Paulette Hooley



Charitable Giving is...

- Voluntary
- Donors don't have to give!
- No Strings attached to gift!
- Must have charitable intent!



Asking is Innate! WHO? WHEN? **HOW MUCH?** Ask!



RESPONSE...

- Yes then what
- No then what
- Think about it and get back to you...



Key to the Ask!

- The *right* person asking for the *right* amount at the *right* time!
- You must ask!
- You must be patient!



Community/Events

- Identify prospects
- Bring awareness to need
- Very little receipting required
- Costs can be high
- Cost/\$ raised is higher



Individual Giving

- More volunteer involvement
- Screened prospects
- More strategic/greater impact
- Cost/\$ raised lowers



Engaging Individual Donors

Monthly Giving Program

- Admin heavy
- Receipting once a year
- Usually a 7-year commitment

Direct Mail Program

- Unaddressed mail
- Response rate very low
- Some awareness or reminder mail



Engaging Individual Donors

(Cont'd)

Social Media

- One-time hit
- Reactive
- Awareness strong
- Younger demographics

Individual Gifts

- Longer term
- Patience
- Return on investment



The Donor Pyramid





Build the Case for Support

- What is the need?
- Why should I give?
- Who will it help (patients, family, pets, community)?
- What is your goal?
- What are the benefits?



Build the Case (cont'd)

- What is the financial goal?
- How much would you ask someone to give?
- What can you achieve short term?
- What is your long-term goal?
- How will you thank supporters?



Gift Chart to Identify Number of Gifts

 https://www.blackbaud.com/nonprofit-resources/giftrange-calculator

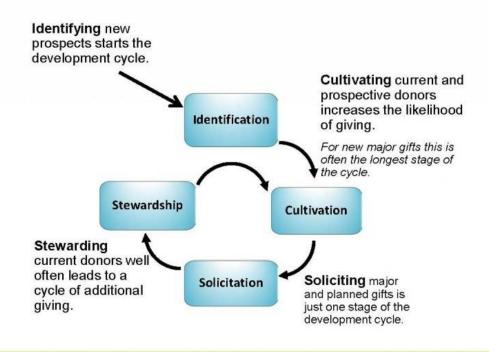
 http://sumac.com/how-to-construct-a-gift-chart-use-itto-secure-major-gifts/



Donor Cycle



The Donor Development Cycle





Identification(Research)

Internal community –

 Staff first, then volunteers and Board members, retired staff

External community -

- Mine your data base
- Past donors
- People with interest in your cause/mission
- People who attend your events



Identification(cont'd)

- Do some research....High net worth donors don't necessarily give to everyone/everything!
- High net worth donors don't necessarily look like they have capacity to give...



Cultivation

(you getting to know them/them getting to know you)

- Go visit,
- Talk about your case,
- Test your case,
- What are their interests,
- Ask for feedback.



Solicitation (The Ask)

- The right person asking for the right amount at the right time!
- Set up a meeting, make a phone call, get in front of them at their location of choice.
- Possibly have gift ranges and what it will support.
- Know ways they can give.



Ways to Give

- Cash, cheques, credit card, on-line
- Monthly giving
- E transfer and on-line banking
- Transfer of Shares
- Multi-year Pledge
- Planned Gifts
 - Bequests (Gifts in Will)
 - Life Insurance
 - RRSP/RRIFs



Stewardship (Donor Relations)

- Thank you is obvious!
- Charitable receipt is required.
- So...what is meaningful for this donor?

(Impact of gift/ gift use/ update on the project/other gifts, recognition, tour)



Compliance with CRA

- Charities Directorate Number keep it close (memorize it!!) 1-800-267-2384
- What information goes on a receipt, CRA website
- Gifts in kind receipting...monitor closely



Success in the Ask!

Success is...

- The right person asking for the right amount at the right time! (Peer to Peer/face to face)
- Give first, before you ask!
- Ask!
- Gratitude!



Ask and it shall be...

I've tried to get money by asking for it and not asking for it.

You get a lot more money by asking for it.

Millard Fillmore, Founder Habitat for Humanity



Thank you!

