

# Individual Giving: *The Artful Ask!*

Presenter: Barbara Dunphy

Special Guest: Paulette Hooley



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# 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!

**QEH**  
Foundation

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# 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



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# 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/gift-range-calculator>
- <http://sumac.com/how-to-construct-a-gift-chart-use-it-to-secure-major-gifts/>

# Donor Cycle



## The Donor Development Cycle

**Identifying** new prospects starts the development cycle.

**Identification**

**Cultivating** current and prospective donors increases the likelihood of giving.

*For new major gifts this is often the longest stage of the cycle.*

**Stewardship**

**Cultivation**

**Stewarding** current donors well often leads to a cycle of additional giving.

**Solicitation**

**Soliciting** major and planned gifts is just one stage of the development cycle.



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# 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



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Thank you!



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