

# BUILDING RELATIONSHIPS FOR INDIVIDUAL GIFT SUCCESS

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services to inspire philanthropy

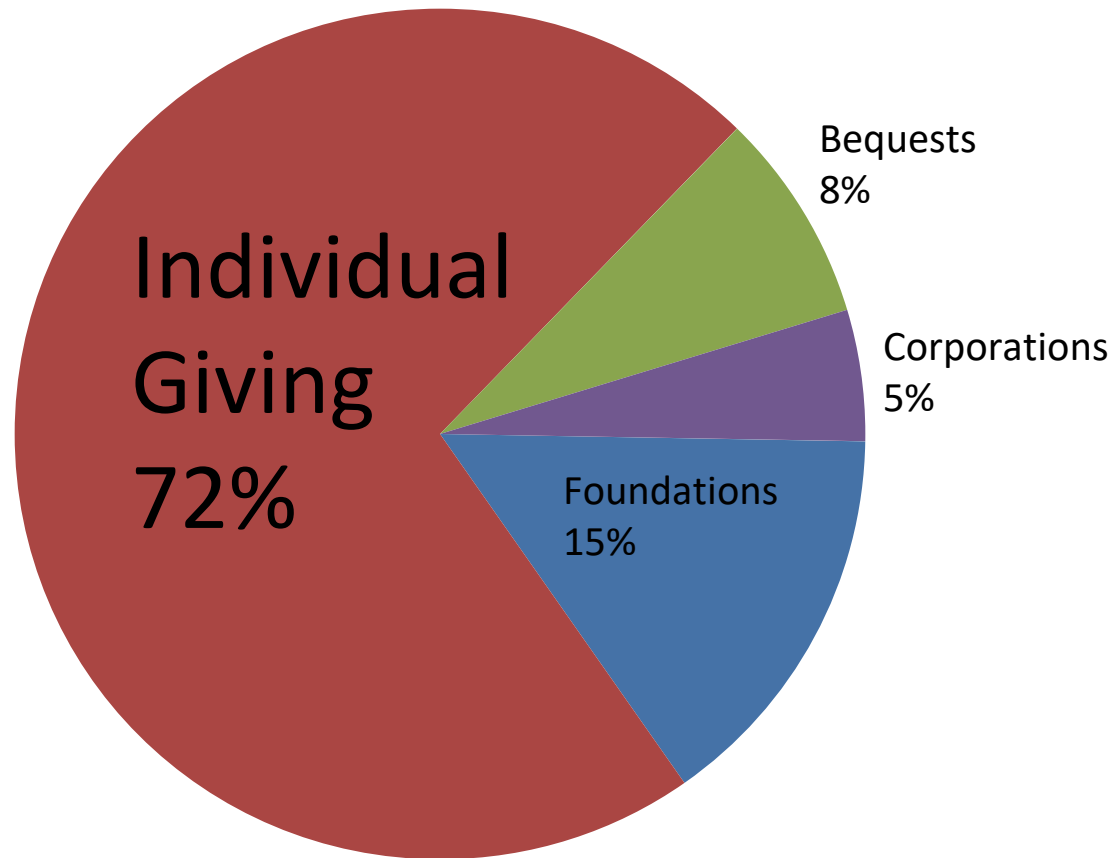
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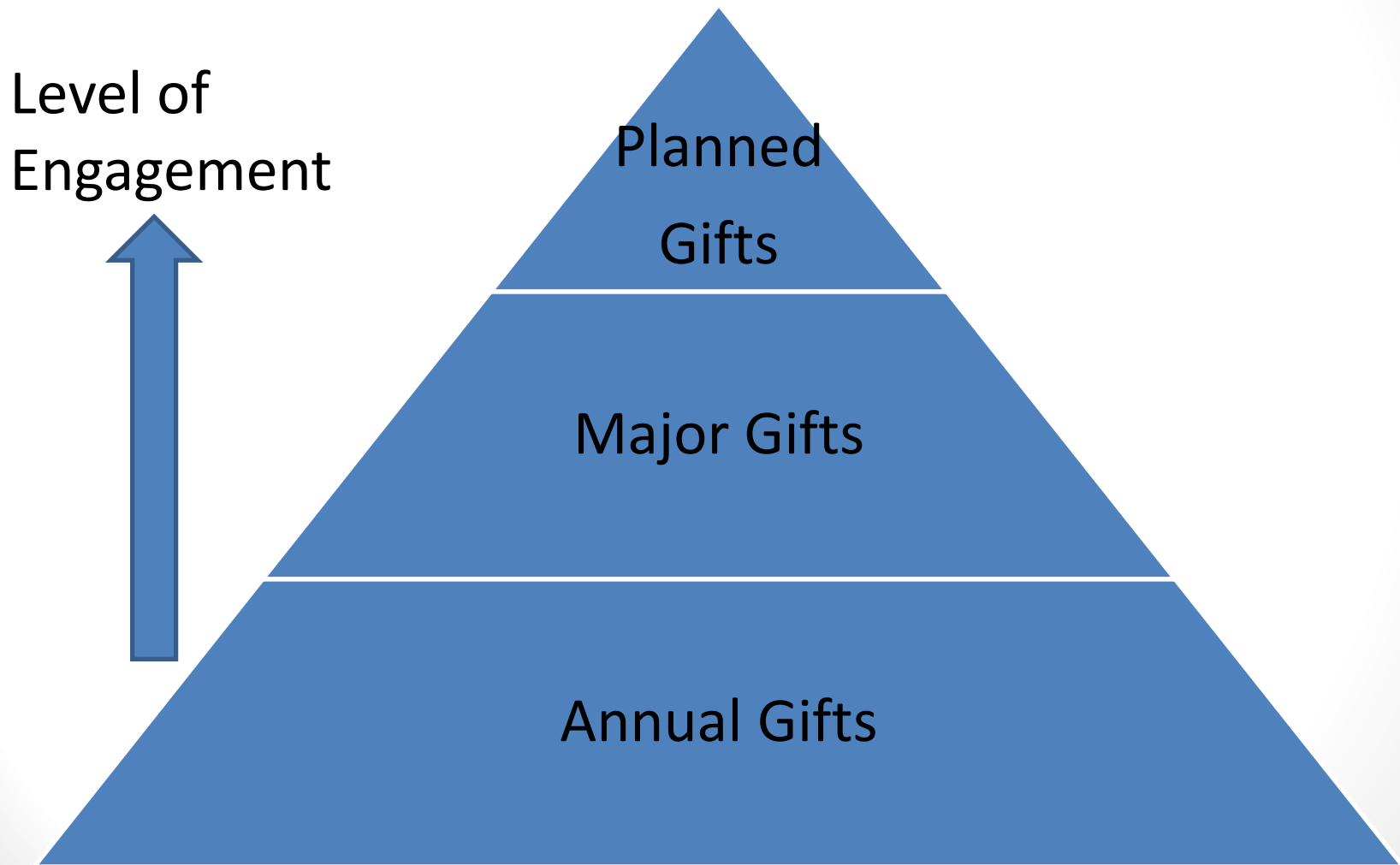
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# Why Individual Giving?



From *Giving USA 2017 Highlights*, IUPUI Lily School of Philanthropy 2017

# Types of Individual Gifts



# Organizational Preparation for Successful Individual Giving

- Compelling case statement
- Prospect research
- Marketing and Communications Plan
- Board giving and getting
- Gift management/Stewardship
- Volunteers trained
- Evaluation Plan

# INDIVIDUAL DONOR KEY ATTRIBUTES



# Donor Truth

Interest

+

Ability to Give

# Donor Motivation

- *Mission*
- *Values*
- *Solve Problems*
- *Social*
- *Legacy*
- *Tax implications*
- *Recognition*
- *Timing*
- *Heal*
- *Feel good*

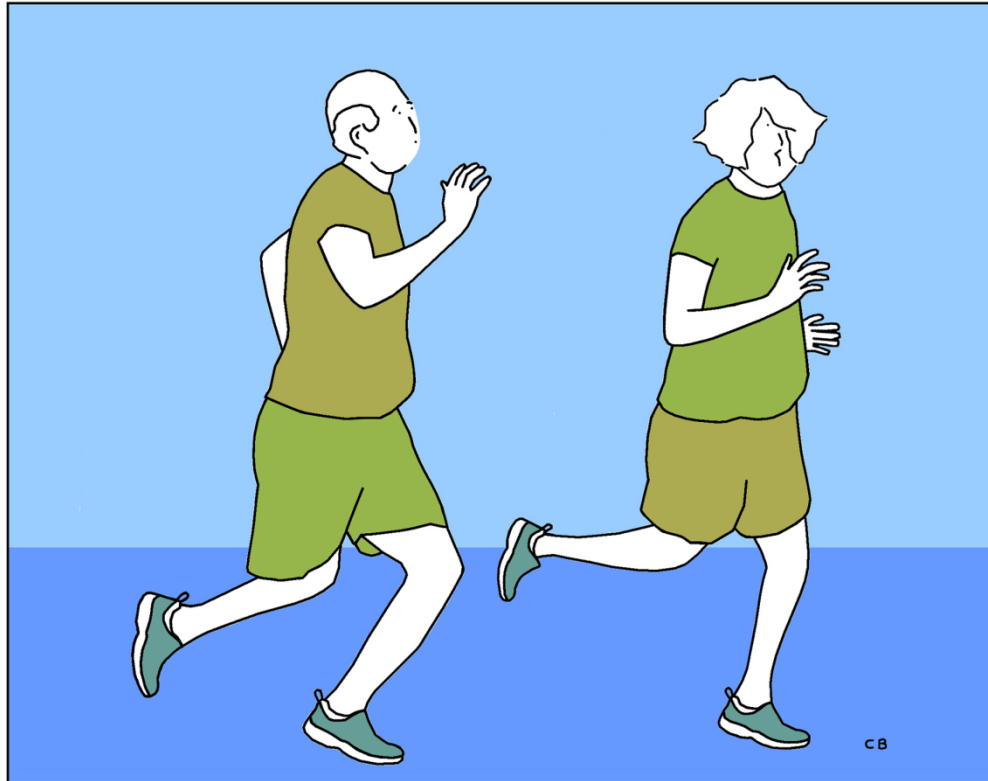


# Prospect Markets

- Previous Donors
- Board of Directors
- Advisory Boards and Committees
- Volunteers
- Contacts of the Board and Volunteers
- Members
- Grateful Clients/Patients
- Client Relatives
- Event Attendees
- Visitors to your Website
- Donors to similar organizations
- Affinity Groups



# ANNUAL GIFTS



*"This isn't rocket science, Chuck. You donate \$1,000 to a charity. You feel good. That's it."*

# Annual Fund Elements

- Unrestricted support/Operating support
- Largest donor market and most impersonal
- Lowest capacity but...
- ...may includes planned and major gift prospects
- ...and a source for volunteer support

# Types of Annual Giving Appeals

- Direct mail
- Telephone solicitation-- staff, volunteer , or professional
- Electronic solicitation– website or email
- Personal visit-- staff or volunteer
- Events
- Combination

# Annual Fund Strategies

- Acquire new donors- special events, direct mail and email
- Renew and retain annual support-- direct mail, personal calls and visits
- Upgrade donors using gift clubs- personal solicitation
- Build volunteer support- campaign committee and volunteer solicitation
- Use challenge gifts or matching gifts
- Identify major donors
- Identify future leaders

# MAJOR GIFTS



**“I won’t be donating my tech billions  
to *this* school.”**

# Major Gift Elements

- Vary in size by organization
- May include different types of gifts– cash, pledges, stock, etc.
- More likely to have restricted purpose
- Include personal meeting
- **Demonstrate Donor Commitment**

# Key Factors for Major Gift Success

- Leadership Support
- Relationship Management
- Prospect Strategies
- Gift Discussions

# RELATIONSHIPS = SUSTAINABILITY

*People will forget what you said.  
They will forget what you did. But  
they will never forget how you  
made them feel. – Maya Angelou*



# Building Leadership Support for Major Gifts

## PRESENT DATA AND RATIONALE

- 80% giving from individuals
- Pareto Principle: 80/20 (90/10)
- Donor Relationships= Sustainability
- ROI-Calculate ROI: Revenue/Expenses= ROI
- Pilot Project
- 6 in 10 \$1M Donors Give in their home state

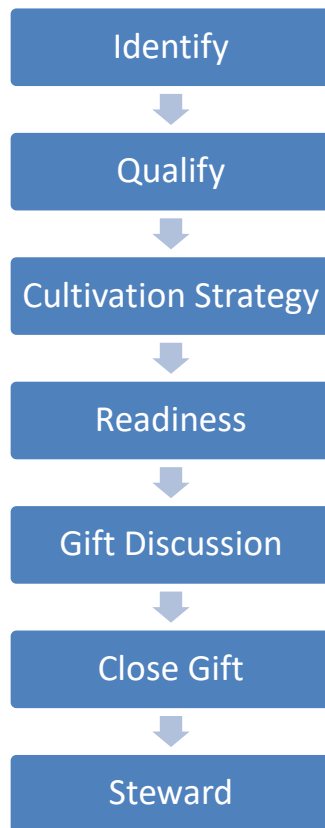
## ENLIST CHAMPIONS

- Board Members
- Existing Major Donors or Prospects to tell story

## ENGAGE BOARD TO GIVE, GET AND GET TRAINED

# Relationship Management

## New Prospect

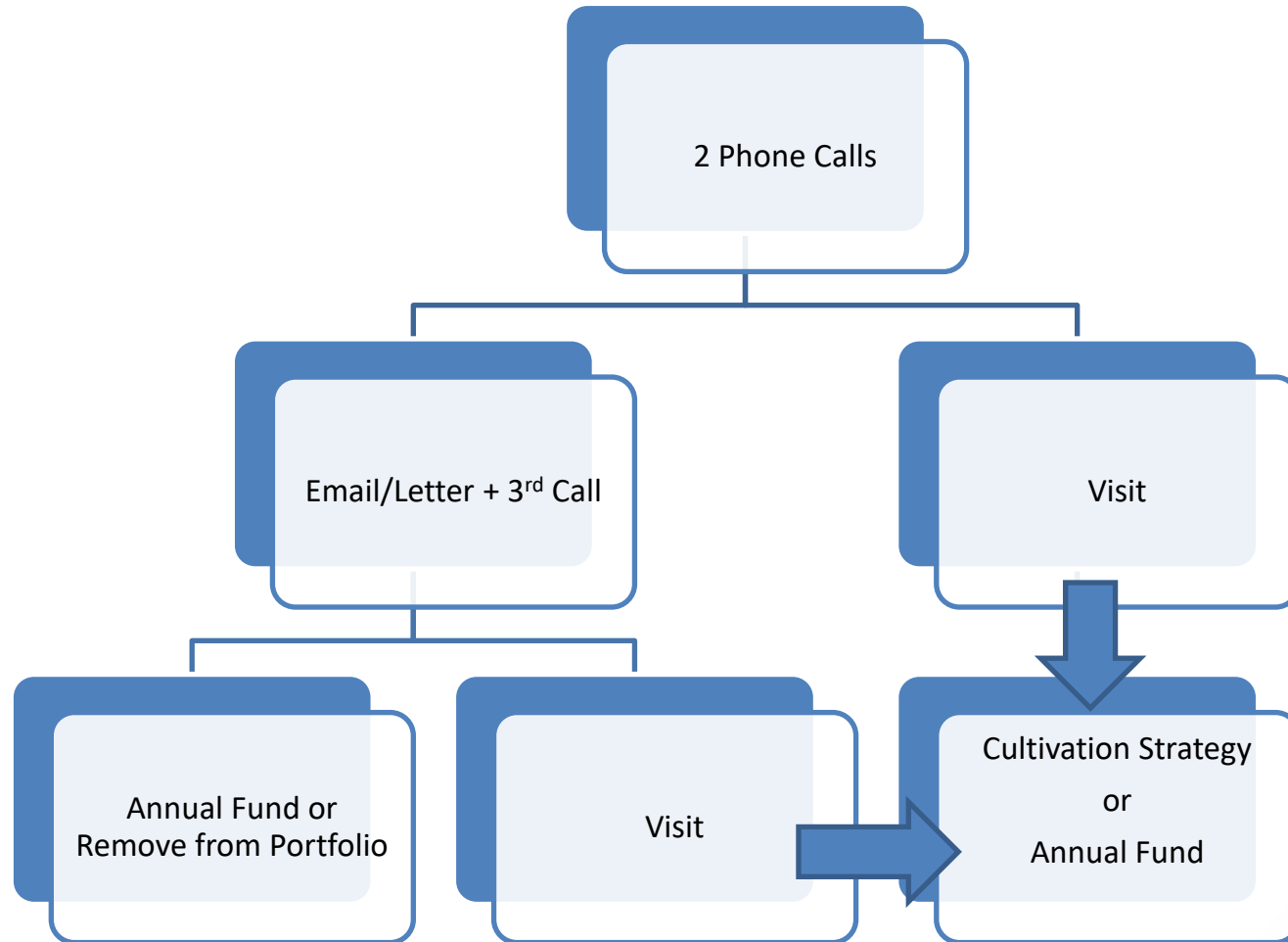


## Current Donor



# Qualification

## Getting the Visit



# Building Prospect Strategies

## Gather Information

- Research
- Volunteers
- Identify key participants for cultivation and gift discussion

## Develop Plan of Action

- Develop timetable for actions and gift discussion
- Test project ideas and funding levels

## Implement Plan

- Schedule cultivation activity
- Re-evaluate strategy after each action
- Add actions and next steps to move management system

# Cultivation Activities

## Regular Communications

- Annual Report
- Newsletter

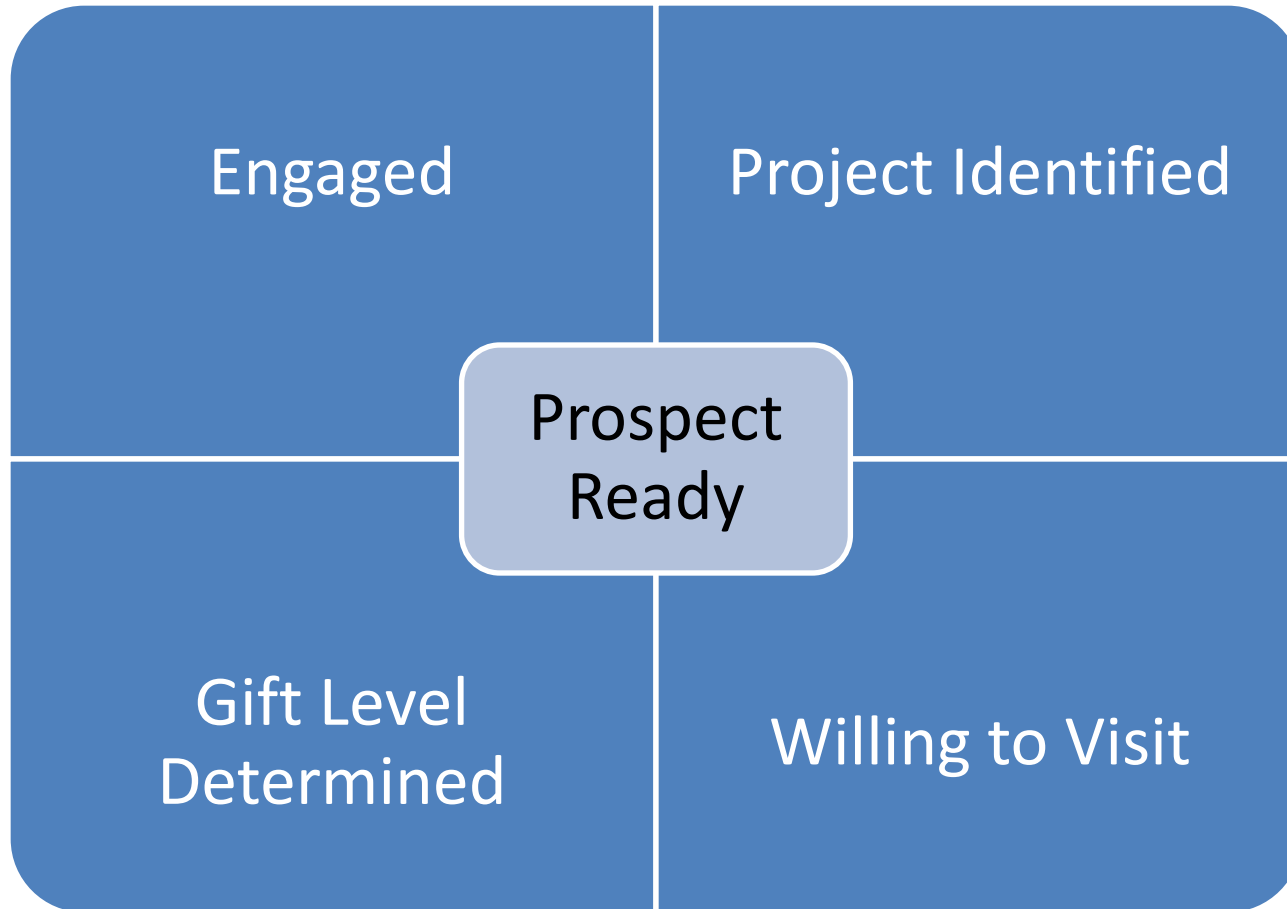
## Events

- Small group dinners
- Educational programs
- Tours or programmatic engagement

## Personal

- Visits with staff, leadership
- Volunteer
- Become a Client/Customer

# Prospect Readiness



# Gift Discussion Planning

## Strategy

- Specific project and gift level determined
- Solicitors identified and make gifts
- Internal and volunteer approvals/buy in

## Logistics

- Meeting date and location
- Meeting scheduled

## Preparation


- Volunteer and leadership briefings
- Pre-solicitation meeting to review agenda and roles
- Proposals and collateral materials

# Major Gift Conversation


- Establish Rapport (5-10 minutes)
- State the purpose of the meeting and review the case for support (10 minutes)
- Ask for a specific gift at a specific amount (5-10 minutes)
- STOP TALKING AND LISTEN for feedback (15 minutes)
- Discussion (15 minutes)
- Close the ask and determine next steps (5 minutes)
  
- ESTIMATED TIME FOR MEETING: 1 hour




# Objections



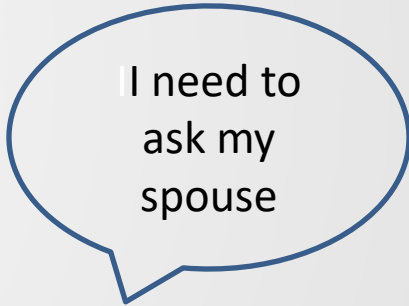
I don't  
know your  
CEO



Do you have  
a deficit?



Wow! That gift is  
way out of my  
league.



I need to  
ask my  
spouse

Don't be afraid to walk away from a donor. It is not worth the gift if you must compromise your values and policies

# Follow Up

Need more  
information

- Gather additional information
- Schedule another meeting

Document  
solicitation

- Prepare proposal
- Prepare gift agreement

Complete  
Cycle

- Close gift
- Develop stewardship plan