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# Identifying, Cultivating and Asking Individual Donors

Presented by:  
Suzanne L. Seiter, CFRE - Senior Consultant

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# Individuals: Why Do They Give?

- Because they are asked
- Because they believe in the mission of your organization
- Because they know and respect individuals involved with your organization
- Because they believe your organization is well managed and produces measurable results

# Individuals: Why Do They Give?

- Because giving makes them feel good
- Because they want to give back
- Because they want recognition for their gifts
- Because they want income tax deductions

# Giving in Tough Economic Times

- More than \$300 billion given to charity in the U.S. in 2009, only 2 % less than the previous year
- 72% of gifts were given by living people; 10% were made as bequests
- People continue to give in tough economic times

# Giving in Tough Economic Times

- People are less likely to add charities to their giving list when money is tight – many will trim their list
- Organizations that continue to cultivate and ask donors will be in best position when the economy rebounds
- Tough economic times are ideal for cultivating individual donors and marketing planned gifts

# Who Are Good Individual Prospects?

Board members

Former board members

Current donors

Volunteers

Event guests

Vendors

Staff

Clients & their families

# Fundraising is Everyone's Business

- Create a culture of fundraising
- Enlist all staff, volunteers and board members to be your eyes and ears and mouthpiece in the community
- Provide them with sound bytes and stories
- Create a “talk back” mechanism to capture who they talk to and what they learn
- Record everything in your data base.

# Fundraising is Everyone's Business

- Use part of each board and staff meeting to educate your team about a particular aspect of your organization, including budget and current needs
- Informed and confident staff and board members make better fundraisers

# How Many Prospects Do You Need?

- Plan on 3-4 prospects for every gift you need
- Full time major gifts officer should have 75 prospects, maximum
- Executive Director should have 25 top prospects
- Board members should have a maximum of 5 prospects at a time
- Always have an A list, B list, C list

# Cultivate Your Prospects

- Get acquainted personally; ask to visit their home or office
- Invite prospects to programs and give them the VIP treatment
- Communicate with top prospects frequently and personally
- Treat top prospects like family and prepare them to be asked

# Finally – Ask for the Gift

## Get the appointment

- Determine the best pair to make the ask
- Best connected member calls to set appointment
- Set the meeting for a quiet time and place

## Finally – Ask for the Gift

- Staff member briefs the prospect on the “ask” program; volunteer shares why he/she is involved with the organization; volunteer or staff member makes the ask; no one speaks until the prospect reacts to the ask
- Solicitation team rehearses the visit

# Meeting Objections

- “The amount is too high.” Offer extended payment options
- “The amount is still too high.” Ask the donor for amount he/she is comfortable giving.
- “I need to talk this over with my spouse or financial consultant.” Affirm that this is a wise decision and set a time frame for response.
- “This is not a good time for me.” Ask when would be a good time.
- “I’ve changed my philanthropic interests.”

## Following up

- Ask to follow up again in two weeks
- Try to set a return visit
- If unsuccessful, call soon after you return to your office and thank for visit and try to set the return appointment.
- You cannot say “thank you” too often or in too many personal ways to donors.
- Continue to steward actively after the gift is made.



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Suzanne Seiter, CFRE  
Senior Consultant  
Schultz & Williams, Florida

941-932-3536  
sseiter@schultzwilliams.com

Schultz & Williams  
325 Chestnut Street, Suite 700  
Philadelphia, PA 19106  
phone: 215-625-9955 x100  
schultzwilliams.com  
e-mail: mail@schultzwilliams.com

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